

# PHAPlans

5YearPlanforFiscalYears2002 -2006  
AnnualPlanforFiscalYear2002

**SPOKANEHOUSINGAUTHORITY  
SPOKANE,WASHINGTON  
WA055v02**

**NOTE:THISPHAPLANSTEMPLATE(HUD50075)ISTOBECOMPLETEDIN  
ACCORDANCEWITHINSTRUCTIONSLOCATEDINAPPLICABLEPIHNOTICES**

# SHA STRATEGIC PLAN AND 5 YEAR AGENCY PLAN WITH OBJECTIVES AND STRATEGIES FY2002-2006

## SPOKANE HOUSING AUTHORITY MISSION

THE SPOKANE HOUSING AUTHORITY IS DEDICATED TO INCREASING SAFE, AFFORDABLE HOUSING AND PROVIDING OPPORTUNITIES FOR PERSONS EXPERIENCING BARRIERS TO HOUSING

## SPOKANE HOUSING AUTHORITY VISION

THE SPOKANE HOUSING AUTHORITY WILL LEAD THE COMMUNITY IN ASSISTING RESIDENTS WITH AFFORDABLE HOUSING NEEDS, WHILE CREATING OPPORTUNITIES AND INCENTIVES FOR SELF-SUFFICIENCY

**STRATEGIC GOAL #1: Increase** the availability of safe, decent affordable housing.

### Objective #1:

Prioritize and review targeting of SHA services and resources.

### **Strategies:**

- 1) Using homeless demographics of the City and 2000 community census data compare City/County needs with SHA demographics.
  - 1(a) Continue implementation of SHA's development plan of 2001.
  - 1(b) Continue to assess the development role of SHA over the four county service area. FY2002
  - 1(c) Identify tenant based rent assistance needs in 4 county service area and respond to appropriate NOFA's.
- 2) Continue a more proactive role in the implementation of local and regional comprehensive plans, housing ordinances and regulations and housing affordability strategies.
  - 2(a) Participate in the City of Spokane Development Code Task Force
  - 2(b) Continue to work with non-profit, city and county representatives to develop a regional strategy for preserving OPT-OUT Section 8 properties
- 3) Evaluate and possibly restructure housing units to best meet targeted populations and increase financial soundness in the ongoing operations.
  - 3(a) Complete conversion of Public Housing units to Section 8
    - 3(a1) Apply for public housing conversion with project vouchers/Section 8 for family scattered site units and Parsons with conversion being completed in FY03.
    - 3(a2) Explore homeownership program for current scattered site Public Housing units. FY04
  - 3(b) Implement conversion with Management and Capital Plans for FY03
  - 3(c) Resolve ownership and use of the Newark Apartments during FY03
- 3(d) Provide annual application for Project Vouchers to 4-county service area
  - 3(d1) At least annually determine and announce the number of new vouchers that will be available and set aside for project voucher program
- 3(e) Explore and determine direction for SHA for Section 8 homeownership program

### Objective #2:

Leverage private or other public funds to create additional housing opportunities.

**Strategies:**

- 1) Seek opportunities to use SHATax Exempt Conduit Bonding capacity to enhance affordable housing development, activities of local non-profit entities;
- 2) Acquire or build additional units of affordable housing utilizing Tax Credits, Bonds, FHLB, HOME, Trust Fund and other funding resources.
  - 2(a) Affordable housing will include units targeted for very low-income households (30% of median income) to low income households (50% to 80% of median income).
  - 2(c) Facilitate neighborhood input in predevelopment of potential SHAProperties.
- 3) Continue building partnerships that will enhance affordable housing opportunities in new developments.
  - 3(a) Determine status of listing for accessible units with Coalition of the Responsible Disabled (CORD).
  - 3(b) Increase regional development strategies with SLIHC partners
- 4) Pursue 501(c)3 and CHDO status
- 5) Implement the Welcome Home program if approved by FHA/ HUD.

**Objective#3**

Improve the quality of assisted/affordable housing.

**Strategies:**

- 1) Continue to assess customer satisfaction with different constituencies.
  - 1(a) Complete an annual customer services survey
  - 1(b) Include changes in service delivery during each budget cycle
  - 1(c) Continue to facilitate Landlord Advisory Group for service delivery evaluation
  - 1(d) Implement a Landlord training/symposium program
- 2) Continue to evaluate staff structure and responsibilities to improve efficiencies and effectiveness of program implementation.
  - 2(a) Identify and implement increased use of technology to streamline tenant application process and landlord HAP contracting.
- 3) Apply Asset Management principles and practices to all SHAProperties.
  - 3(a) Establish capital replacement plan for all properties –FY03
  - 3(b) Establish property management performance benchmarks
- 4) Continue to work with and solicit input regarding SHAServices from the RAB.
  - 4(a) Staff assigned to work with RAB support
  - 4(b) Annual Budget to support RAB activities, stipends and training
- 5) Explore rental housing rehab/lead based paint abatement program for Section 8 Landlords
  - 5(a) Explore using City and County CDBG and HOME funds
  - 5(b) Assist in program development, implementation and administration of a program

**Objective#4**

Advocate for affordable housing throughout Spokane and the Inland Northwest

**Strategies:**

- 1) Strengthen and expand collaborative partnerships with area-wide service providers.
- 2) Continue to provide voucher mobility counseling with special emphasis on deconcentration opportunities.
  - 2(a) Continue to monitor payment standards for each county implement allowable payment standards that best benefit program participants by region.
- 3) Promote initiatives for tenant stability with landlords.
  - 3(b) Conduct outreach effort to potential voucher landlords.

- 3(b1) Utilize SHA's "Landlord Liaison" quarterly newsletter and membership in Inland Empire Rental Association to conduct outreach to potential voucher landlords with the goal of adding 25 new landlords per year.
- 3(b2) Collaborate with Northwest Justice, Columbia Legal Services and Northwest Fair Housing to advocate on behalf of Section 8 participants
- 3(b3) Pursue avenues that will assist landlords in lead-based paint compliance
- 3(b4) Continue participation in Stay -Put Program .
- 4) Increased direct deposits participation by landlords by 5% per year.

**STRATEGIC GOAL #2:** Improve community quality of life and economic vitality.

**Objective #1**

Continue to aggressively market SHA Housing to ensure a mix of incomes throughout our programs.

**Strategies:**

- 1) Maintain screening procedures to identify areas of tenant/neighborhood concerns.
  - 1(a) Document and track applicant denials due to criminal history.
- 2) Continue to work with local law enforcement and Community Policing agencies to enhance the safety and security of our public and assisted housing and the neighborhoods in which they are located.
  - 2(a) Participate in Operation Safe Home with HUD throughout Spokane County.
  - 2(b) Continue support for the COP Shop @ Parsons and the SCOPES Shop @ Valley 206
  - 2(c) Pursue Crime Free Multi -family Status for all SHA owned properties
- 3) Support community efforts to reduce crime and drugs.
  - 3(a) Continue participation with Spokane Police and Spokane Sheriff's Departments in the investigation of complaints and participant program compliance.

**STRATEGIC GOAL #3:** Promote self -sufficiency and assist development of families and individuals

**Objective #1:**

Increase the number and percentage of employed persons in assisted families.

**Strategies:**

- 1) Raise the percentage of employed persons in assisted housing over the five -year plan period by promoting positive Welfare to Work, Independent Families Futures and ROSS outcomes.
  - 1(a) Develop a computer tracking and reporting system
- 2) Encourage the use of volunteer/community service experience to increase client employability.
  - 2(a) Promote community service with IFF participants for future job readiness.
  - 2(b) Continue to identify and recruit training/volunteer positions within SHA
  - 2(c) Promote the hiring of SHA volunteers, residents and program participants for vacant SHA job openings.

**Objective: #2**

Provide or attract supportive services to improve assisted recipients' employability.

**Strategies:**

- 1) Develop and enhance specific programs and housing facilities to promote client/tenant self -sufficiency.
  - 1(a) Enhance support program for W to W participants
- 2) Target a communication plan to the Spokane community, which demonstrates the impact of SHA's self-sufficiency programs.
  - 2(a) Public Acknowledgement of annual IFF graduates
  - 2(b) Expand IFF newsletter to a Resident Initiatives Newsletter and expand distribution .

- 3) Target a communication plan to clients that consistently conveys SHA's commitment to helping all clients reach self-sufficiency.

**3(a)** Develop posters advertising self-sufficiency programs for SHA offices –FY03

- 4) Continue to encourage the use of escrowed savings offered by your Resident Initiatives Program for home ownership.

**4(a)** Refer program participants to service providers for home buyer assistance.

**Objective:#3**

Provide or attract supportive services to increase independence for elderly or families with disabilities.

**Strategies:**

- 1) Continue to enhance the viability of the Parson's Resident Association as a 501C-3, by providing technical assistance and support.

**1(a)** Staff assigned to provide on-going assistance

**1(b)** Continue to provide technical assistance for accounting and taxes.

- 2) Promote the delivery of quality support systems by owners of SRO Moderate Rehab projects.

**2(a)** Quarterly meetings with SRO owners and SHA staff to review operations

- 3) Continue to encourage the involvement of the social work departments of local institutions of higher learning and other local service agencies in the development/operation of innovative support systems.

**3(a)** Pursue grant dollars for social services for the Parsons –FY02

**STRATEGIC GOAL #4:** Ensure Equal Opportunity in Housing for all Citizens.

**Objective:#1**

Undertake affirmative measures to ensure access and a suitable living environment to assisted housing regardless of race, color, religion, national origin, sex, familial status, age and disability.

**Strategies:**

- 1) Ensure annual training of all SHA staff in Fair Housing Principles and procedures.

- 2) Expand marketing of all housing opportunities throughout the SHA service area.

**2(a)** Continue to provide Landlord listings for Section 8 participants

**2(b)** Provide information to Section 8 participants of rental property locations that promote a deconcentration of poverty.

**2(c)** Provide ADA training for Operations staff.

- 3) Provide assistance to families in need of reasonable accommodation.

- 4) Establish clear designation of staff responsibility for equal opportunity compliance.

**4(a)** Executive Director for grievance hearings

**4(b)** Operations Director for ADA compliance

- 5) Continue to support completion and full community utilization of a database of local accessible housing units begun with a SHA grant to CORD.

- 6) Partner with landlord associations to provide education regarding ADA and other Fair Housing issues for landlords.

**STRATEGIC GOAL #5: Improve** SHA long-term financial stability.

**Objective:#1**

All housing developments will be self-sustaining utilizing diverse financing and funding sources.

**Strategies:**

- 1) Continue financial projections scenarios that indicate the fiscal impact of alternative programs and development decisions.

- 2) Through development and asset management fees expand revenue sources for the operation of SHA

**Objective:#2**

Develop annual budgets that implement SHA goals and strategies and reflect program costs.

**Strategies:**

- 1) Identify efficiencies and cost savings for SHA programs and staffing plan.
- 2) Monitor and evaluate expanded property management services FY03
  - 2(a) Explore marketing property management services to non-profit housing providers
- 3) Develop and implement Departmental Budgeting process –FY03

**Objective:#3**

Explore possibilities to expand the service area of SHA

**Strategies:**

- 1) Discuss the creation of a consortia with other housing authorities in the Inland Northwest.
- 2) Explore expansion of SHA to other counties if state law is amended.
- 3) **Negotiate** interlocal agreements with new governmental entities with in Spokane County

**STRATEGIC GOAL #6**

Expand and enhance the public image of SHA.

**Objective:#1**

Continue to use all available media to inform the general public about housing needs and successes.

**Strategies:**

- 1) Help to educate the general public on how people can become involved in creating housing solutions by offering increased presentation to local groups and organizations.
- 2) Update and release informational brochures and regular updates on WEB site
- 3) On-going and consistent contact by the Executive Director or with media representatives
- 4) To continue staff participation in local community coalitions and organizations.

**Objective#2**

Develop new marketing tools for SHA's properties.

**Strategies:**

- 1) Implement the marketing plan for each SHA property to be included in the Property Management Plan.

**STRATEGIC GOAL #7**

Promote a motivating work environment with a capable and efficient team of employees to operate as a customer-friendly and fiscally prudent leader in the affordable housing community.

**Objective#1**

Standardize with performance measures job tasks and assignments.

**Strategies:**

- 1) Maintain and update a comprehensive SHA Policy/Procedure Manual.
  - 1(a) Develop desk manual to provide greater detail to specific job positions and task assignments –complete by FY03
- 2) Continue to analyze work practices to enable staff to complete work safely.
- 3) Continue to analyze capital needs for improved work environment.

- 4) Analyze staff workloads and identify new or expanded tasks requiring skills and capacities not currently included in organizational structure.
- 5) **Develop** a 5-year information systems plan

**Objective #2**

Enhance training opportunities and communications systems for all levels of staff.

**Strategies:**

- 1) Develop a training plan for each staff person at SHA.
- 2) Identify and make available training opportunities for staff.
  - 2(a) Update annual all-staff training plan with monthly training for all staff
- 3) **Provide** monthly supervisor training for all staff with supervisory responsibilities.

**PHA Plan  
Agency Identification**

**PHAName:** Spokane Housing Authority

**PHANumber:** WA055

**PHAFiscalYearBeginning:** 07/2002

**Public Access to Information**

**Information regarding any activities outlined in this plan can be obtained by contacting: (select all that apply)**

- ☒ Main administrative office of the PHA
- ☐ PHA development management offices
- ☒ PHA local offices

**Display Locations For PHA Plans and Supporting Documents**

The PHA Plans (including attachments) are available for public inspection at: (select all that apply)

- ☒ Main administrative office of the PHA
- ☐ PHA development management offices
- ☒ PHA local offices
- ☐ Main administrative office of the local government
- ☐ Main administrative office of the County government
- ☐ Main administrative office of the State government
- ☐ Public library
- ☒ PHA website
- ☒ Other (list below)  
Spokane City and Spokane County Community Development Offices

PHA Plan Supporting Documents are available for inspection at: (select all that apply)

- ☒ Main business office of the PHA
- ☐ PHA development management offices
- ☒ Other (list below)  
PHA Local Offices

**5-YEAR PLAN**



## PHAF ISCAL YEARS 2002 -2006

[24CFRPart903.5]

Statement of Progress Attachment [wa055p02]

### A.Mission

State the PHA's mission for serving the needs of low -income, very low income, and extremely low -income families in the PHA's jurisdiction. (select one of the choices below)

- ☐ The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- ☒ The PHA's mission is:

**The Spokane Housing Authority is dedicated to increasing safe, affordable housing and providing opportunities for persons experiencing barrier to housing.**

### B.Goals

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHAs may select any of these goals and objectives as their own, or identify other goals and/or objectives. Whether selecting the HUD -suggested objectives or their own, **PHAS ARE STRONGLY EN COURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS .** (Quantifiable measures would include target sets such as: numbers of families served or PHAS scores achieved.) PHAs should identify these measures in the space to the right of or below the stated objectives.

**HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing.**

- ☒ PHA Goal: Expand the supply of assisted housing  
Objectives:
- ☒ Apply for additional rental vouchers:
- ☐ Reduce public housing vacancies:
- ☒ Leverage private or other public funds to create additional housing opportunities:
- Provide SHA tax -exempt bonding capacity to enhance affordable housing development activities of local non -profit entities. Provide project vouchers for new affordable housing that will assist in making projects financially stable.**
- ☐ Acquire or build units or developments
- ☐ Other (list below)
- ☐ PHA Goal: Improve the quality of assisted housing

Objectives:

- ☒ Improve public housing management: (PHAS score) 75.1
- ☒ Improve voucher management: (SEMAP score) 89
- ☒ Increase customer satisfaction:  
**Complete annual customer satisfaction survey**
- ☐ Concentrate one effort to improve specific management functions:  
(list; e.g., public housing finance; voucher unit inspections)
- ☐ Renovate or modernize public housing units:
- ☐ Demolish or dispose of obsolete public housing:
- ☐ Provide replacement public housing:
- ☐ Provide replacement vouchers:
- ☒ Other: (list below)  
**Pursue conversion of public housing units when Final Rule is published**

☒ PHA Goal: Increase assisted housing choices

Objectives:

- ☒ Provide voucher mobility counseling:  
**Continue to provide voucher mobility counseling with special emphasis on deconcentration opportunities.**
- ☒ Conduct outreach effort to potential voucher landlords  
**Publish *Landlord Liaison* Newsletter on a quarterly basis**  
**Offer an annual Landlord Symposium**  
**Submit informational articles to Inland Empire Rental Association monthly newsletter.**
- ☒ Increase voucher payment standards  
**All voucher payments will beat 110% of FMR if rent reasonable.**
- ☐ Implement voucher homeownership program:
- ☒ Implement public housing or other homeownership programs:  
**Implement lease-to-own homeownership program**  
**Continue to encourage use of escrowed savings by graduating participants in FSS Program for home purchase.**  
**Explore Section 8 Homeownership Program**
- ☐ Implement public housing site-based waiting lists:
- ☒ Convert public housing to vouchers:  
**Will submit request as directed with Final Rule publication.**
- ☐ Other: (list below)

### HUD Strategic Goal: Improve community quality of life and economic vitality

☒ PHA Goal: Provide an improved living environment

Objectives:

- ☐ Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:
- ☐ Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
- ☐ Implement public housing security improvements:
- ☐ Designate developments or buildings for particular resident groups (elderly, persons with disabilities)
- ☒ Other: (list below)
  - Continue to market SHA public housing to ensure a mix of income throughout the program.**
  - Maintain screening procedures.**
  - Continue to work with local law enforcement to enhance the safety of SHA housing and the neighborhoods in which they are located.**
  - Pursue Crime Free Multi-Family status for all SHA-owned properties.**

**HUD Strategic Goal: Promote self-sufficiency and asset development of families and individuals**

☒ PHA Goal: Promote self-sufficiency and asset development of assisted households

Objectives:

- ☒ Increase the number and percentage of employed persons in assisted families:
  - Implement Welfare-to-Work strategies to develop family work plans that promote employment.**
  - Implement Resident Opportunities strategies to develop family work plans that promote employment.**
- ☒ Provide or attract supportive services to improve assistance recipients' employability:
  - Enhance the working relationship with partners for both the ROSS and WtoW Programs.**
- ☒ Provide or attract supportive services to increase independence for the elderly or families with disabilities.
  - Continue to enhance the viability of the Parsons Resident Association.**
  - Promote the delivery of quality support services by owners of SRO projects.**
  - Work with social work departments of local institutions of higher learning to develop programs that would be beneficial to SHA residents.**

☐ Other:(listbelow)

**HUD Strategic Goal: Ensure Equal Opportunity in Housing for all Americans**

- ☒ PHA Goal: Ensure equal opportunity and affirmatively further fair housing  
Objectives:
- ☒ Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion, national origin, sex, familial status, and disability:  
**Ensure annual training of all SHA staff in Fair Housing principles and procedures.**  
**Partner with landlord associations to provide training to Section 8 Landlords.**
  - ☐ Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion, national origin, sex, familial status, and disability:
  - ☒ Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:  
**Continue to support completion of a data base of local accessible housing units.**
  - ☐ Other:(listbelow)

**Other PHA Goals and Objectives:(listbelow)**

- ☒ PHA Goal: Improve long-term financial stability
- ☒ All housing developments will be self-sustaining
  - ☒ Expand and diversify funding sources through development fees, management and asset management fees and expansion of property management services to non-profit housing developers
- ☒ PHA Goal: Strengthen the working relationship with government entities within SHA service area
- ☒ Explore the development of a rental rehab program for Section 8 and other affordable housing landlords using HOME and CDBG funds
  - ☒ Negotiate interlocal agreements with governmental entities within Spokane County
  - ☒ Pursue joint county/county jurisdiction if Washington State law is successfully amended
  - ☒ Explore the development of a consortium with other local housing authorities in the Inland Northwest

- ☒ PHAGoal:Promoteamotivatingworkenvironment withcapable andefficient  
employeeestoooperateasacustomer -friendlyandfiscally -prudentleaderinthe  
affordablehousingcommunity
  - ☒ Reviewandupdateemployeeandproceduralmanualsonanannualbasis
  - ☒ Analyzeworkloads,workpracticesandcapitalimpr ovementstoenhance  
staffefficienciesandmeetservicedeliverygoals
  - ☒ Developa5 -yearinformationservicesplan

**AnnualPHAPlan**  
**PHAFiscalYear2002**  
[24CFRPart903.7]

**i. AnnualPlanType:**

SelectwhichtypeofAnnualPlanthePHAwill submit.

☒ **StandardPlan**

**StreamlinedPlan:**

- ☐ **HighPerformingPHA**  
☐ **SmallAgency(<250PublicHousingUnits)**  
☐ **AdministeringSection8Only**

☐ **TroubledAgencyPlan**

**ii. ExecutiveSummaryoftheAnnualPHAPlan**

[24CFRPart903.79(r)]

ProvideabriefoverviewoftheinformationintheAnnualPlan,includinghighlightsofmajorinitiatives anddiscretionarypoliciesthePHAhasincludedintheAnnualPlan.

**iii. AnnualPlanTableofContents**

[24CFRPart903.79(r)]

ProvideatableofcontentsfortheAnnualPlan ,includingattachments,andalistofsupporting documentsavailableforpublicinspection .

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## Attachments

Indicate which attachments are provided by selecting all that apply. Provide the attachment's name (A, B, etc.) in the space to the left of the name of the attachment. Note: If the attachment is provided as a **SEPARATE** file submission from the PHA Plans file, provide the filename in parentheses in the space to the right of the title.

### Required Attachments:

- ☒ Admissions Policy for Deconcentration [wa055a0 1]
- ☒ FY2002 Capital Fund Program Annual Statement [wa055b0 1]
- ☐ Most recent board -approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

### Optional Attachments:

- ☒ PHA Management Organizational Chart [wa055g0 1]
- ☒ FY2002 Capital Fund Program 5 Year Action Plan [wa055f 01]
- ☐ Public Housing Drug Elimination Program (PHDEP) Plan
- ☐ Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- ☒ Other (List below, providing each attachment name)
  - Public Housing Asset Management Table [wa055c0 1]
  - RAB and Resident Membership of the PHA Governing Board [wa055d0 1]
  - Public Housing Pet Policy [wa055e0 1]
  - Cooperative Agreement between PHA and TANF Agency [wa055h0 1]
  - FSS Annual Report [wa055i0 1]
  - Welfare to Work Strategic Plan [wa055j0 1]
  - Voluntary Conversion of Public Housing Market Analysis [wa055k0 1]
  - SHA Program Chart [wa055l0 1]
  - Other Public Comments [wa055m0 1]
  - Board Resolution #370 Suspending Community Service Requirement [wa055n0 1]
  - RAB Meeting Minutes August 2001 [wa055o0 1]
  - Statement of Progress in Meeting Five -Year Plan Mission & Goal [wa055p02]

### Supporting Documents Available for Review

Indicate which documents are available for public review by placing a mark in the "Applicable & On Display" column in the appropriate rows. All listed documents must be on display if applicable to the program activities conducted by the PHA.

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	PHA Plan Certification of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdiction to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's involvement.	5 Year and Annual Plans
X	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI) and any additional backup data to support statement of housing needs in the jurisdiction)	Annual Plan: Housing Needs
	Most recent board -approved operating budget for the public housing program	Annual Plan: Financial Resources;
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certification of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the methodology for setting public housing flat rents <input checked="" type="checkbox"/> check here if included in the public housing A&O Policy	Annual Plan: Rent Determination
X	Schedule of flat rents offered each public housing development <input checked="" type="checkbox"/> check here if included in the public housing A&O Policy	Annual Plan: Rent Determination



<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A&O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
NA	The HUD -approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
X	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
NA	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
NA	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
NA	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
NA	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
X	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
NA	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
NA	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
X	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self - Sufficiency
X	Most recent self - sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self - Sufficiency
NA	The most recent Public Housing Drug Elimination Program (PHDEP) semi - annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
NA	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)
X	SHA ACOP and Section 8 Administrative Plan	

## **1. Statement of Housing Needs**

[24CFR Part 903.79(a)]

### **Strategies for Addressing Needs**

In the year 2002, the Spokane Housing Authority (SHA) will use all reasonable effort to provide safe and affordable housing to extremely low -income, very low income and low -income residents of Spokane, Stevens, Whitman and Pend Oreille counties.

SHA plans to purchase and/or construct housing units of mixed income and seek opportunities to partner with for -profit and non -profit developers and preserve affordable housing through the purchase of Project Based Section 8 units in the affordable housing market. SHA will continue to expand the tenant based housing voucher program. SHA will be flexible and responsive to the needs of our communities by providing conduit bond financing for low -income housing development and rehab. SHA is committed to addressing the needs of special needs and senior low -income households through the use of project -based vouchers.

Finally, in addition to providing ongoing rental assistance to 4000 families, the Spokane Housing Authority will continue to assist hundred of families under the Welfare to Work and Family Unification programs. Each of these families will be given the opportunity to participate in our Family Self - Sufficiency Program

and will be referred to a number of other community service organizations to help maximize individual success.

#### A. Housing Need of Families in the Jurisdiction/s Served by the PHA

Based upon the information contained in the Consolidated Plan/s applicable to the jurisdiction, and/or other data available to the PHA, provide a statement of the housing needs in the jurisdiction by completing the following table. In the "Overall" Needs column, provide the estimated number of renter families that have housing needs. For the remaining characteristics, rate the impact of that factor on the housing needs for each family type, from 1 to 5, with 1 being "no impact" and 5 being "severe impact." Use N/A to indicate that no information is available upon which the PHA can make this assessment.

Housing Need of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford- ability	Supply	Quality	Access- ibility	Size	Loca- tion
Income ≤ 30% of AMI	10,408*	5	5	5	3	5	5
Income > 30% but ≤ 50% of AMI	3,938*	5	5	5	3	5	4
Income > 50% but < 80% of AMI	1,710*	3	4	5	3	4	3
Elderly	6,605*	4	4	4	5	3	2
Families with Disabilities	6,956*	5	5	5	5	4	4
Race/Ethnicity	NA	NA	NA	NA	NA	NA	NA
Race/Ethnicity	NA	NA	NA	NA	NA	NA	NA
Race/Ethnicity	NA	NA	NA	NA	NA	NA	NA
Race/Ethnicity	NA	NA	NA	NA	NA	NA	NA

\*City of Spokane Only

Spokane County has 29,394 low -income households with housing needs/problems (sources did not divide by income amounts)

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- ☒ Consolidated Plan of the Jurisdiction/s  
Indicate year:  
**1999 City of Spokane Consolidated Community Development Housing Plan**  
**1995 Washington State Consolidated Plan**  
**2000 Spokane Housing Affordability Report**  
**2000-2002 Spokane County Consolidated Plan**

- ☐ U.S. Census data: the Comprehensive Housing Affordability Strategy ("CHAS") dataset

- ☐ American Housing Survey data  
Indicate year:
- ☐ Other housing market study  
Indicate year:
- ☒ Other sources: (list and indicate year of information)  
**Community Agency Survey 12/2/99**

## B. Housing Needs of Families on the Public Housing and Section 8 Tenant-Based Assistance Waiting Lists

State the housing needs of the families on the PHA's waiting list/s. **Complete one table for each type of PHA - wide waiting list administered by the PHA.** PHAs may provide separate tables for site-based or sub-jurisdictional public housing waiting lists at their option.

Housing Needs of Families on the Waiting List (Based on Review Conducted 12/99 through 1/00)			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	1880		25
Extremely low income <=30% AMI	1808	96	
Very low income (>30% but <=50% AMI)	68	4	
Low income (>50% but <80% AMI)	4	.22	
Families with children	1260	67	
Elderly families	89	5	
Families with Disabilities	629	33	
Race/ethnicity - W	1590	85	
Race/ethnicity - B	114	6	
Race/ethnicity - A	41	2	
Race/ethnicity - NA	135	7	

<b>HousingNeedsofFamiliesontheWaitingList</b> (BasedonReviewConducted12/99through1/00)			
Race/ethnicity -H	71	4	
Characteristicsby BedroomSize(Public HousingOnly)			
1BR	541	34	
2BR	834	42	
3BR	442	23	
4BRormore	61	1	
Isthewaitinglistclosed(selectone)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
Ifyes: Howlonghasitbeenenclosed(#ofmonths)? DoesthePHAexpecttoreopenhelistinthePHAPlanyear? <input type="checkbox"/> No <input type="checkbox"/> Yes DoesthePHApermitspecificcategoriesoffamiliesontothewaitinglist,evenif generallyclosed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

<b>HousingNeedsofFamiliesontheWaitingList</b>			
Waitinglisttype:(selectone) <input checked="" type="checkbox"/> Section8tenant -basedassistance <input type="checkbox"/> PublicHousing <input type="checkbox"/> CombinedSection8andPublicHousing <input type="checkbox"/> PublicHousingSite -Basedorsub -jurisdictionalwaitinglist(optional) Ifused,identifywhichdevelopment/subjurisdiction:			
	#offamilies	%oftotalfamilies	AnnualTurnover
Waitinglisttotal	3329		1400
Extremelylowincome <=30%A MI	2752	83	
Verylowincome (>30%but<=50%AMI)	575	17	
Lowincome (>50%but<80%AMI)	2	.06	
Familieswithchildren	1871	56	
Elderlyfamilies	233	6	
Familieswith Disabilities	1232	37	
Race/ethnicity -W	2855	86	

Housing Needs of Families on the Waiting List			
Race/ethnicity -B	192	6	
Race/ethnicity -A	68	2	
Race/ethnicity -NA	214	6	
Race/ethnicity -H	124	3	
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2BR			
3BR			
4BR or more			
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes If yes: How long has it been closed (# of months)? Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

### C. Strategy for Addressing Needs

Provide a brief description of the PHA's strategy for addressing the housing needs of families in the jurisdiction and on the waiting list **IN THE UPCOMING YEAR**, and the Agency's reasons for choosing this strategy.

#### (1) Strategies

**Need: Shortage of affordable housing for all eligible populations**

**Strategy 1. Maximize the number of affordable units available to the PHA within its current resources by:**

Select all that apply

- ☒ Employ effective maintenance and management policies to minimize the number of public housing units off -line
- ☒ Reduce turnover time for vacated public housing units
- ☐ Reduce time to renovate public housing units
- ☐ Seek replacement of public housing units lost to the inventory through mixed financed development
- ☐ Seek replacement of public housing units lost to the inventory through section 8 replacement housing resources
- ☒ Maintain or increase section 8 lease -up rates by establishing payment standards that will enable families to rent throughout the jurisdiction -at 110% Payment Standards

- ☒ Undertake measure to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
  - ☒ Maintain or increase section 8 lease -uprates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration –Landlord Advisory Group, Landlord Liaison Quarterly Newsletter, work with Inland Empire Rental Association
  - ☒ Maintain or increase section 8 lease -uprates by effectively screening Section 8 applicants to increase owner acceptance of program –Crime Check, Previous Landlord information
  - ☒ Participate in the Consolidated Plan development process to ensure coordination with broader community strategies
  - ☒ Other (list below)
- Award Project Based Vouchers**

### **Strategy 2: Increase the number of affordable housing units by:**

Select all that apply

- ☒ Apply for additional section 8 units should they become available
- ☒ Leverage affordable housing resources in the community through the creation of mixed -finance housing
- ☒ Pursue housing resources other than public housing or Section 8 tenant -based assistance.
- ☐ Other: (list below)

### **Need: Specific Family Types: Families at or below 30% of median**

#### **Strategy 1: Target available assistance to families at or below 30% of AMI**

Select all that apply

- ☒ Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing
- ☒ Exceed HUD federal targeting requirements for families at or below 30% of AMI in tenant -based section 8 assistance
- ☐ Employ admissions preferences aimed at families with economic hardships
- ☐ Adopt rent policies to support and encourage work
- ☐ Other: (list below)

### **Need: Specific Family Types: Families at or below 50% of median**

#### **Strategy 1: Target available assistance to families at or below 50% of AMI**

Select all that apply

- ☒ Employ admissions preferences aimed at families who are working
- ☒ Adopt rent policies to support and encourage work

- ☒ Other:(listbelow)  
Provideexperienceandtrainingforvolunteers

**Need:SpecificFamilyTypes:TheElderly**

**Strategy1: Targetavailableassistancetotheelderly:**

Selectallthatapply

- ☐ Seekdesignationofpublichousingfortheelderly  
☒ Applyforspecial -purposevoucherstargetedtotheelderly,shouldtheybecome available  
☐ Other:(listbelow)

**Need:SpecificFamilyTypes:FamilieswithDisabilities**

**Strategy1: TargetavailableassistancetoFamilieswithDisabilities:**

Selectallthatapply

- ☐ Seekdesignationofpublichousingforfamilieswithdis abilities  
☐ Carryoutthemodificationsneededinpublichousingbasedonthesection504 NeedsAssessmentforPublicHousing  
☒ Applyforspecial -purposevoucherstargetedtofamilieswithdisabilities, shouldtheybecomea vailable  
☒ Affirmativelymarkettolocalnon -profitagenciesthatassistfamilieswith disabilities  
☐ Other:(listbelow)

**Need:SpecificFamilyTypes:Racesorethnicitieswithdisproportionatehousing needs**

**Strategy1: IncreaseawarenessofPHAresourcesamongfamiliesofracesand ethnicitieswithdisproportionateneeds:**

Selectifapplicable

- ☒ Affirmativelymarkettoraces/ethnicitiesshowntohavedisproportionate housingneeds  
☐ Other:(listbelow)

**Strategy2:Conductactivitiestoaffirmativelyfurtherfairhousing**

Selectallthatapply

- ☒ Counselsection8tenantsastolocationofunitsoutsideofareasofpovertyor minorityconcentrationandassistthemtolocate thoseunits  
☒ Marketthesection8programtoownersoutsideofareasofpoverty/minority concentrations



☐ Other:(listbelow)

**OtherHousingNeeds&Strategies:(listneedsandstrategiesbelow)**

**(2)ReasonsforSelect ingStrategies**

Ofthefactorslistedbelow,selectallthatinfluencedthePHA'sselectionofthe strategiesitwillpursue:

- ☒ Fundingconstraints
- ☒ Staffingconstraints
- ☒ Limitedavailabilityofsitesfora ssistedhousing
- ☒ Extenttowhichparticularhousingneedsaremetbyotherorganizationsinthe community
- ☒ EvidenceofhousingneedsasdemonstratedintheConsolidatedPlanandother informationavailabletothePHA
- ☒ InfluenceofthehousingmarketonPHAprograms
- ☒ Communityprioritiesregardinghousingassistance
- ☒ Resultsofconsultationwithlocalorstategovernment
- ☒ Resultsofconsultationwithreside ntsandtheResidentAdvisoryBoard
- ☒ Resultsofconsultationwithadvocacygroups
- ☐ Other:(listbelow)

**2. StatementofFinancialResources**

[24CFRPart903.79(b)]

Listthefinancialresourcesthatareanticipatedto beavailabletothePHAforthesupportofFederal publichousingandtenant -basedSection8assistanceprogramsadministeredbythePHAduringthePlan year.Note:thetableassumes thatFederalpublichousingortenantbasedSection8assistancegrant fundsareexpendedoneligiblepurposes;therefore,usesofthesefundsneednotbestated.Forother funds,indicatetheuseforthosefundsasoneofthefollowingcategories:publichousingoperations, publichousingcapitalimprovements,publichousing safety/security,publichousing supportiveservices, Section8tenant -basedassistance,Section8supportiveservicesorother.

<b>FinancialResources: PlannedSourcesandUses</b>		
<b>Sources</b>	<b>Planned\$</b>	<b>PlannedUses</b>
<b>1. FederalGrants(FY2002grants)</b>		
a) PublicHousingOperatingFund	218,522	
b) PublicHousingCapitalFund	234,796	
c) HOPEVIR revitalization		

<b>FinancialResources: PlannedSourcesandUses</b>		
<b>Sources</b>	<b>Planned\$</b>	<b>PlannedUses</b>
d) HOPEVIDemolition		
e) AnnualContributionsforSection8 Tenant-BasedAssistance	16,473,183	
f) PublicHousingDrugElimination Program(includinganyT echnical Assistancefunds)		
g) ResidentOpportunityandSelf - SufficiencyGrants		
h) CommunityDevelopmentBlock Grant		
i) HOME	550,000	TBRA
OtherFederalGrants(listbelow)		
HOPWA	341,000	TBRA
FSS	120,757	
<b>2.PriorYearFederalGrants (unobligatedfund sonly)(listbelow)</b>		
2000CFP	71,188	P.H.CapitalNeeds
2001CFP	225,796	P.H.CapitalNeeds
2001ROSS	25,000	
<b>3.PublicHousingDwellingRental Income</b>	281,428	P.H.Operations
<b>4.Otherincome (listbelow)</b>		
PublicHousingInterestIncome	4,000	P.H.Operations
Section8InterestIncome	20,000	Section8Operations
<b>4.Non -federalsources (listbelow)</b>		
<b>Totalresources</b>	18,565,670	

### **3.PHAPoliciesGoverningEligibility,Selection,andAdmissions**

[24CFRPart903.7 9(c)]

## A. Public Housing

Exemptions: PHA that do not administer public housing are not required to complete subcomponent 3A.

### (1) Eligibility

a. When does the PHA verify eligibility for admission to public housing? (select all that apply)

☒ When families are within a certain number of being offered a unit: **1-10 places on waiting list**

☒ When families are within a certain time of being offered a unit: **1-3 months**

☒ Other: **As units become available**

b. Which non-income (screening) factors does the PHA use to establish eligibility for admission to public housing? (select all that apply)?

☒ Criminal or Drug -related activity

☒ Rental history

☒ Housekeeping

☒ Other

**Utility Bill Payment History**

c. ☐ Yes ☒ No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

d. ☒ Yes ☐ No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

e. ☒ Yes ☐ No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC - authorized source)

### (2) Waiting List Organization

a. Which methods does the PHA plan to use to organize its public housing waiting list (select all that apply)

☒ Community-wide list

☐ Sub-jurisdictional lists

☐ Site-based waiting lists

☒ Other

**Applicants May Indicate Area/Project Preferences**

b. Where may interested persons apply for admission to public housing?

☒ PHA main administrative office

☒ PHA development/site management office

☐ Other (list below)

c. If the PHA plan to operate one or more site-based waiting lists in the coming year, answer each of the following questions; if not, skip to subsection **(3) Assignment**

1. How many site-based waiting lists will the PHA operate in the coming year?

2. ☐ Yes ☐ No: Are any or all of the PHA's site-based waiting lists new for the upcoming year (that is, they are not part of a previously HUD-approved site-based waiting list plan)? If yes, how many lists?

3. ☐ Yes ☐ No: May families be on more than one list simultaneously? If yes, how many lists?

4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?

- ☐ PHA main administrative office
- ☐ All PHA development management offices
- ☐ Management offices at developments with site-based waiting lists
- ☐ At the development to which they would like to apply
- ☐ Other (list below)

### **(3) Assignment**

a. How many vacant unit choices are applicants ordinarily given before they fall to the bottom of or are removed from the waiting list? (select one)

- ☐ One
- ☒ Two
- ☐ Three or More

b. ☒ Yes ☐ No: Is this policy consistent across all waiting list types?

c. If answer to b is no, list variations for any other than the primary public housing waiting list/s for the PHA:

### **(4) Admissions Preferences**

a. Income targeting:

☒ Yes ☐ No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income?

b. Transfer policies:

In what circumstances will transfer take precedence over new admissions? (list below)

- ☒ Emergencies
- ☒ Overhoused
- ☒ Underhoused
- ☒ Medical justification
- ☒ Administrative reasons determined by the PHA (e.g., to permit modernization work)
- ☐ Resident choice: (state circumstances below)
- ☒ Other:

**Reasonable Accommodation**

c. Preferences

1. ☒ Yes ☐ No: Has the PHA established preferences for admission to public housing (other than date and time of application)? (If "no" is selected, skip to subsection **(5) Occupancy**)
2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences:

- ☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- ☐ Victims of domestic violence
- ☐ Substandard housing
- ☐ Homelessness
- ☐ High rent burden (rent is > 50 percent of income)

Other preferences: (select below)

- ☒ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans' families
- ☒ Residents who live and/or work in the jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Household that contribute to meeting income goals (broad range of incomes)
- ☒ Household that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☒ Other preference(s)

**Accessibility Needs**

3.If the PHA will employ admissions preferences, please prioritize by placing a “1” in the space that represents your first priority, a “2” in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a points system), place the same number next to each. That means you can use “1” more than once, “2” more than once, etc.

### 3 Date and Time

Former Federal preferences:

Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)  
 Victims of domestic violence  
 Substandard housing  
 Homelessness  
 High rent burden

Other preferences (select all that apply)

- 2 Working families and those unable to work because of age or disability
- Veterans and veterans' families
- 1 Residents who live and/or work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- 1 Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- 2 Other preference(s)
- Accessibility Needs**

4. Relationship of preferences to income targeting requirements:

- ☐ The PHA applies preferences within income tiers
- ☒ Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements

### **(5) Occupancy**

a. What reference materials can applicants and residents use to obtain information about the rules of occupancy of public housing (select all that apply)

- ☒ The PHA - resident lease
- ☒ The PHA's Admissions and (Continued) Occupancy policy
- ☒ PHA briefing seminars or written materials
- ☒ Other source

## HUD

b. How often must residents notify the PHA of changes in family composition?

(select all that apply)

- ☒ At an annual reexamination and lease renewal
- ☒ Anytime family composition changes
- ☒ At family request for revision
- ☐ Other (list)

### **(6) Deconcentration and Income Mixing**

a. ☐ Yes ☒ No Does the PHA have any general occupancy (family) public housing developments covered by the deconcentration rule? If no, this section is complete. If yes, continue to the next question.

b. ☐ Yes ☐ No Do any of these covered developments have average incomes above or below 85% to 115% of the average incomes of all such developments? If no, this section is complete.

If yes, list these developments as follows:

Deconcentration Policy for Covered Developments			
Development Name :	Number of Units	Explanation (if any) [see step 4 at §903.2(c)(1)(iv)]	Deconcentration policy (if no explanation) [see step 5 at §903.2(c)(1)(v)]

c. If the answer to b was yes, what changes were adopted? (select all that apply)

- ☐ Adoption of site based waiting lists  
If selected, list targeted developments below:
- ☐ Employing waiting list "skipping" to achieve deconcentration of poverty or income mixing goals at targeted developments  
If selected, list targeted developments below:
- ☐ Employing new admission preferences at targeted developments  
If selected, list targeted developments below:

☐ Other(list policies and development targeted below)

d. ☐ Yes ☒ No: Did the PHA adopt any changes to **other** policies based on the results of the required analysis of the need for deconcentration of poverty and income mixing?

e. If the answer to d was yes, how would you describe these changes? (select all that apply)

- ☐ Additional affirmative marketing
- ☐ Actions to improve the marketability of certain developments
- ☐ Adoption or adjustment of ceiling rents for certain developments
- ☐ Adoption of rent incentives to encourage deconcentration of poverty and income-mixing
- ☐ Other(list below)

f. Based on the results of the required analysis, in which developments will the PHA make special efforts to attract or retain higher -income families? (select all that apply)

- ☒ Not applicable: results of analysis did not indicate a need for such efforts
- ☐ List (any applicable) developments below:

g. Based on the results of the required analysis, in which developments will the PHA make special efforts to assure access for lower -income families? (select all that apply)

- ☒ Not applicable: results of analysis did not indicate a need for such efforts
- ☐ List (any applicable) developments below:

## B. Section 8

Exemptions: PHAs that do not administer section 8 are not required to complete sub -component 3B. Unless otherwise specified, all questions in this section apply only to the tenant -based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).

### (1) Eligibility

a. What is the extent of screening conducted by the PHA? (select all that apply)

- ☐ Criminal or drug -related activity only to the extent required by law or regulation
- ☒ Criminal and drug -related activity, more extensively than required by law or regulation
- ☐ More general screening than criminal and drug -related activity (list factors below)
- ☐ Other(list below)



- b. ☐ Yes ☒ No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- c. ☒ Yes ☐ No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- d. ☐ Yes ☒ No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC - authorized source)
- e. Indicate what kinds of information you share with prospective landlords? (select all that apply)
- ☐ Criminal or drug -related activity
- ☒ Other
- Current and Past Landlord/Tenant History**

## **(2) Waiting List Organization**

- a. With which of the following program waiting lists is the section 8 tenant -based assistance waiting list merged? (select all that apply)
- ☒ None
- ☐ Federal public housing
- ☐ Federal moderate rehabilitation
- ☐ Federal project -based certificate program
- ☐ Other federal or local program (list below)
- b. Where may interested persons apply for admission to section 8 tenant -based assistance? (select all that apply)
- ☒ PHA main administrative office
- ☒ Other
- SHA Local Offices**
- CAC Office in Pullman, WA**

## **(3) Search Time**

- a. ☒ Yes ☐ No: Does the PHA give extensions on standard 60 -day period to search for a unit?

If yes, state circumstances below: **The applicant made reasonable efforts during the 60 -day period to secure housing or; me dicale emergency prevented housing search efforts or; a request for reasonable accommodation is submitted and approved.**

#### **(4) Admissions Preferences**

##### a. Income targeting

☒ Yes ☐ No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the section 8 program to families at or below 30% of median area income?

##### b. Preferences

1. ☒ Yes ☐ No: Has the PHA established preferences for admission to section 8 tenant-based assistance? (other than date and time of application) (if no, skip to subcomponent **(5) Special purpose section 8 assistance programs**)

2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

##### Former Federal preferences

- ☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- ☐ Victims of domestic violence
- ☐ Substandard housing
- ☐ Homelessness
- ☐ High rent burden (rent is > 50 percent of income)

##### Other preferences (select all that apply)

- ☐ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans' families
- ☐ Residents who live and/or work in your jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Household that contribute to meeting income goals (broad range of incomes)
- ☒ Household that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☒ Other preference(s)

##### **Terminal Illness**

##### **Families that are not Currently in Subsidized Housing**

##### **Single Household that are Elderly/Disabled or Displaced Families**

3. If the PHA will employ admissions preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a points system), place the

same number next to each. That means you can use “1” more than once, “2” more than once, etc.

**4 Date and Time**

**Former Federal preferences**

Involuntary Displacement (Disaster, Government Action, Action of Housing  
Owner, Inaccessibility, Property Disposition)  
Victims of domestic violence  
Substandard housing  
Homelessness  
High rent burden

**Other preferences (select all that apply)**

Working families and those unable to work because of age or disability  
Veterans and veterans' families  
Residents who live and/or work in your jurisdiction  
Those enrolled currently in educational, training, or upward mobility programs  
Households that contribute to meeting income goals (broad range of incomes)  
Households that contribute to meeting income requirements (targeting)  
Those previously enrolled in educational, training, or upward mobility programs  
Victims of reprisals or hate crimes

☒ Other preference(s)

**1 Terminal Illness**

**2 Families that are not Currently in Subsidized Housing**

**3 Single Households that are Elderly/Disabled or Displaced Families**

4. Among applicants on the waiting list with the equal preference status, how are applicants selected? (select one)

☒ Date and time of application

☐ Drawing (lottery) or other random choice technique

5. If the PHA plans to employ preferences for “residents who live and/or work in the jurisdiction” (select one)

☐ This preference has previously been reviewed and approved by HUD

☐ The PHA requests approval for this preference through this PHA Plan

6. Relationship of preference to income targeting requirements: (select one)

☐ The PHA applies preferences within income tiers

☒ Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements

#### **(5) Special Purpose Section 8 Assistance Programs**

a. In which documents or other reference materials are the policies governing eligibility, selection, and admission to any special -purpose section 8 program administered by the PHA contained? (select all that apply)

- ☒ The Section 8 Administrative Plan
- ☒ Briefing sessions and written materials
- ☐ Other (list below)

b. How does the PHA announce the availability of any special -purpose section 8 program to the public?

- ☒ Through published notices
- ☒ Other  
**Media, Newsletters, Flyers and Community Networking**

#### **4. PHA Rent Determination Policies**

[24 CFR Part 903.79(d)]

##### **A. Public Housing**

Exemptions: PHA that do not administer public housing are not required to complete sub -component 4A.

##### **(1) Income Based Rent Policies**

Describe the PHA's income based rent setting policy/ies for public housing using, including discretionary (that is, not required by statute or regulation) income based rent disregards and exclusions, in the appropriate spaces below.

a. Use of discretionary policies: (select one)

- ☒ The PHA will not employ any discretionary rent -setting policies for income based rent in public housing. Income -based rents are set at the higher of 30% of adjusted monthly income, 10% of unadjusted monthly income, the welfare rent, or minimum rent (less HUD mandatory deductions and exclusions). (If selected, skip to sub -component (2))

---or---

- ☐ The PHA employs discretionary policies for determining income based rent (If selected, continue to question b.)

b. Minimum Rent

1. What amount best reflects the PHA's minimum rent? (select one)

- ☒ \$0  
☐ \$1-\$25  
☐ \$26-\$50

2. ☐ Yes ☒ No: Has the PHA adopted any discretionary minimum rent hardship exemption policies?

3. If yes to question 2, list these policies below :

c. Rents set at less than 30% than adjusted income

1. ☐ Yes ☒ No: Does the PHA plan to charge rents at a fixed amount or percentage less than 30% of adjusted income?

2. If yes to above, list the amounts or percentages charged and the circumstances under which these will be used below:

d. Which of the discretionary (optional) deductions and/or exclusions policies does the PHA plan to employ (select all that apply)

- ☐ For the earned income of a previously unemployed household member  
☐ For increases in earned income  
☐ Fixed amount (other than general rent -setting policy)  
 If yes, state amount/s and circumstances below:

- ☐ Fixed percentage (other than general rent -setting policy)  
 If yes, state percentage/s and circumstances below:

- ☐ For household heads  
☐ For other family members  
☐ For transportation expenses  
☐ For the non-reimbursed medical expenses of non-disabled or non-elderly families  
☐ Other (describe below)

e. Ceiling rents

1. Do you have ceiling rents? (rents set at a level lower than 30% of adjusted income) (select one)

- ☒ Yes for all developments  
☐ Yes but only for some developments  
☐ No

2. For which kinds of developments are ceiling rents in place? (select all that apply)

- ☒ For all developments
- ☐ For all general occupancy developments (not elderly or disabled or elderly only)
- ☐ For specified general occupancy developments
- ☐ For certain parts of developments; e.g., the high-rise portion
- ☐ For certain size units; e.g., larger bedroom sizes
- ☐ Other (list below)

3. Select the space or spaces that best describe how you arrive at ceiling rents (select all that apply)

- ☐ Market comparability study
- ☒ Fair market rents (FMR)
- ☐ 95<sup>th</sup> percentile rents
- ☐ 75 percent of operating costs
- ☐ 100 percent of operating costs for general occupancy (family) developments
- ☐ Operating costs plus debt service
- ☒ The "rental value" of the unit
- ☐ Other (list below)

f. Rent determination:

1. Between income reexaminations, how often must tenants report changes in income or family composition to the PHA such that the changes result in an adjustment to rent? (select all that apply)

- ☐ Never
- ☐ At family option
- ☐ Anytime the family experiences an income increase
- ☐ Anytime a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold)
- ☒ Other (list below)

**0 Rents**

**Changes in Family Composition**

**Decreases in Income**

g. ☐ Yes ☒ No: Does the PHA plan to implement individual savings accounts for residents (ISAs) as an alternative to the required 12-month disallowance of earned income and phasing in of rent increases in the next year?

## **(2) Flat Rents**

1. In setting the market -based flat rents, what sources of information did the PHA use to establish comparability? (select all that apply.)

- ☒ These section 8 rents are based on a study of comparable housing
- ☐ Survey of rents listed in local newspaper
- ☐ Survey of similar unassisted units in the neighborhood
- ☐ Other (list/describe below)

## **B. Section 8 Tenant -Based Assistance**

Exemptions: PHAs that do not administer Section 8 tenant -based assistance are not required to complete sub -component 4B. **Unless otherwise specified, all questions in this section apply only to the tenant -based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

## **(1) Payment Standards**

Describe the voucher payment standards and policies .

a. What is the PHA's payment standard? (select the category that best describes your standard)

- ☐ At or above 90% but below 100% of FMR
- ☐ 100% of FMR
- ☒ Above 100% but at or below 110% of FMR
- ☐ Above 110% of FMR (if HUD approved; describe circumstances below)

b. If the payment standard is lower than FMR, why has the PHA selected this standard? (select all that apply)

- ☐ FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area
- ☐ The PHA has chosen to serve additional families by lowering the payment standard
- ☐ Reflects market or submarket
- ☐ Other (list below)

c. If the payment standard is higher than FMR, why has the PHA chosen this level? (select all that apply)

- ☐ FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area
- ☐ Reflects market or submarket
- ☒ To increase housing options for families
- ☒ Other

### **Deconcentration**

d. How often are payment standards reevaluated for adequacy? (select one)

- ☒ Annually  
☐ Other (list below)

e. What factors will the PHA consider in its assessment of the adequacy of its payment standard? (select all that apply)

- ☐ Success rates of assisted families  
☐ Rent burdens of assisted families  
☒ Other

**Deconcentration**

## **(2) Minimum Rent**

a. What amount best reflects the PHA's minimum rent? (select one)

- ☒ \$0  
☐ \$1-\$25  
☐ \$26-\$50

b. ☐ Yes ☒ No: Has the PHA adopted any discretionary minimum rent hardship exemption policies? (if yes, list below)

## **5. Operations and Management**

[24CFR Part 903.79(e)]

Exemptions from Component 5: High performing and small PHAs are not required to complete this section. Section 8 only PHAs must complete parts A, B, and C(2)

### **A. PHA Management Structure**

Describe the PHA's management structure and organization.

(select one)

- ☒ An organization chart showing the PHA's management structure and organization is attached. [wa055g0 1]  
☐ A brief description of the management structure and organization of the PHA follows:

### **B. HUD Programs Under PHA Management**

List Federal programs administered by the PHA, number of families served at the beginning of the upcoming fiscal year, and expected turnover in each. (Use "NA" to indicate that the PHA does not operate any of the programs listed below.)

Program Name	Units or Families Served at	Expected
--------------	-----------------------------	----------



	<b>YearBeginning</b>	<b>Turnover</b>
PublicHousing	123	.024%
Section8Vouchers	2695	12%
Section8Certificates	0	NA
Section8ModRehab	115	80%
SpecialPurposeSection 8Certificates/Vouchers (listindividually)	MainstreamVouchers –100	1%
	FamilyUnification –36	1%
	WelfaretoWork –713	13%
		1%
PublicHousingDrug EliminationProgram (PHDEP)		
OtherFederal Programs(list individually)	ROSS –73	None
	FSS/IFF –500	12%
	HOPWA –51	1%
	HOME -159	6%

### **C.ManagementandMaintenancePolicies**

ListthePHA'spublichousingmanagementandmaintenancepolicydocuments,manualsandhandbooks thatcontaintheAgency'srules,standards,andpolicies thatgovernmaintenanceandmanagementof publichousing,includingadescriptionofany measures necessaryforthe preventionor eradicationof pestinfestation(whichincludescockroachinfestation)andthepoliciesgoverningSection8 management.

(1) PublicHousingMaintenanceandManagement:

**ACOP**

**ProcurementPolicy**

(2) Section8Management:

**ScheduleofMaintenanceCharges**

**Section8AdministrativePlan**

## **6. PHAGrievanceProcedures**

[24CFRPart903.79(f)]

Exemptionsfromcomponent6:HighperformingPHAsarenotrequiredto completecomponent6.  
Section8 -OnlyPHAsareexemptfromsub -component6A.

### A. Public Housing

1. ☐ Yes ☒ No: Has the PHA established any written grievance procedures in addition to federal requirements found at 24 CFR Part 966, Subpart B, for residents of public housing?

If yes, list additions to federal requirements below:

2. Which PHA offices should residents or applicants to public housing contact to initiate the PHA grievance process? (select all that apply)

- ☒ PHA main administrative office  
☐ PHA development management offices  
☒ Other

**Parsons Apartments Office**

### B. Section 8 Tenant -Based Assistance

1. ☐ Yes ☒ No: Has the PHA established an informal review procedure for applicants to the Section 8 tenant -based assistance program and informal hearing procedures for families assisted by the Section 8 tenant -based assistance program in addition to federal requirements found at 24 CFR 982?

If yes, list additions to federal requirements below:

2. Which PHA offices should applicants or assisted families contact to initiate the informal review and informal hearing processes? (select all that apply)

- ☒ PHA main administrative office  
☒ Other

**Stevens County Office, Pend Oreille County Office, Whitman County CAC**

## 7. Capital Improvement Needs

[24 CFR Part 903.79(g)]

Exemptions from Component 7: Section 8 only PHAs are not required to complete this component and may skip to Component 8.

### A. Capital Fund Activities

Exemptions from sub -component 7A: PHAs that will not participate in the Capital Fund Program may skip to component 7B. All other PHAs must complete 7A as instructed.

### (1) Capital Fund Program Annual Statement

Using parts I, II, and III of the Annual Statement for the Capital Fund Program (CFP), identify capital activities the PHA is proposing for the upcoming year to ensure long -term physical and social viability of its public housing developments. This statement can be completed by using the CFP Annual

Statement tables provided in the table library at the end of the PHA Plan template option, by completing and attaching a properly updated HUD -52837.

**OR**, at the PHA's

Select one:

☒ The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment [wa055b0 1]

-or-

☐ The Capital Fund Program Annual Statement is provided below: (if selected, copy the CFP Annual Statement from the Table Library and insert there )

**(2) Optional 5 -Year Action Plan**

Agencies are encouraged to include a 5 -Year Action Plan covering capital work items. This statement can be completed by using the 5 Year Action Plan table provided in the table library at the end of the PHA Plan template **OR** by completing and attaching a properly updated HUD -52834.

a. ☒ Yes ☐ No: Is the PHA providing an optional 5 -Year Action Plan for the Capital Fund? (if no, skip to sub -component 7B)

b. If yes to question a, select one:

☒ The Capital Fund Program 5 -Year Action Plan is provided as an attachment to the PHA Plan at Attachment [wa055f0 1]

-or-

☐ The Capital Fund Program 5 -Year Action Plan is provided below: (if selected, copy the CFP optional 5 Year Action Plan from the Table Library and insert here)

## **B.HOPEVIandPublicHousingDevelopmentandReplacement Activities(Non -CapitalFund)**

Applicability of sub -component 7B: All PHAs administering public housing. Identify any approved HOPEVI and/or public housing development or replacement activities not described in the Capital Fund Program Annual Statement.

- ☐ Yes ☒ No: a) Has the PHA received a HOPEVI revitalization grant? (if no, skip to question c; if yes, provide response to question b for each grant, copying and completing as many times as necessary)  
b) Status of HOPEVI revitalization grant (complete one set of questions for each grant)

1. Development name:

2. Development (project) number :

3. Status of grant: (select the statement that best describes the current status)

- ☐ Revitalization Plan under development  
☐ Revitalization Plan submitted, pending approval  
☐ Revitalization Plan approved  
☐ Activities pursuant to an approved Revitalization Plan underway

- ☐ Yes ☒ No: c) Does the PHA plan to apply for a HOPEVI Revitalization grant in the Plan year?  
If yes, list development name/s below:

- ☐ Yes ☒ No: d) Will the PHA be engaging in any mixed -financed development activities for public housing in the Plan year?  
If yes, list developments or activities below:

- ☒ Yes ☐ No: e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement?  
If yes, list developments or activities below:

### **Conversion**

## **8. Demolition and Disposition**

[24CFR Part 903.79(h)]

Applicability of component 8: Section 8 only PHAs are not required to complete this section.

1. ☐ Yes ☒ No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 of the U.S. Housing Act of 1937 (42 U.S.C. 1437p)) in the plan Fiscal Year? (If "No", skip to component 9; if "yes", complete one activity description for each development.)

### 2. Activity Description

- ☒ Yes ☐ No: Has the PHA provided the activities description information in the **optional** Public Housing Asset Management Table? (If "yes", skip to component 9. If "No", complete the Activity Description table below.)

<b>Demolition/Disposition Activity Description</b>	
1a. Development name:	
1b. Development (project) number:	
2. Activity type: Demolition <input type="checkbox"/> Disposition <input type="checkbox"/>	
3. Application status (select one) Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>	
4. Date application approved, submitted, or planned for submission: (DD/MM/YY)	
5. Number of units affected:	
6. Coverage of action (select one) <input type="checkbox"/> Part of the development <input type="checkbox"/> Total development	
7. Timeline for activity: a. Actual or projected start date of activity: b. Projected end date of activity:	

## **9. Designation of Public Housing for Occupancy by Elderly Families or Families with Disabilities or Elderly Families and Families with Disabilities**

[24CFR Part 903.79(i)]

Exemptions from Component 9: Section 8 only PHAs are not required to complete this section.

1. ☐ Yes ☒ No: Has the PHA designated or applied for approval to designate or does the PHA plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly families and families with disabilities or will apply for designation for occupancy by only elderly families or only families with disabilities, or by elderly families and families with disabilities as provided by section 7 of the U.S. Housing Act of 1937 (42 U.S.C. 1437e) in the upcoming fiscal year? (If "No", skip to component 10. If "yes", complete one activity description for each development, unless the PHA is eligible to complete a streamlined submission; PHAs completing streamlined submissions may skip to component 10.)

2. Activity Description

- ☒ Yes ☐ No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If "yes", skip to component 10. If "No", complete the Activity Description table below.

Designation of Public Housing Activity Description	
1a. Development name:	
1b. Development (project) number:	
2. Designation type:	
Occupancy by only the elderly	<input type="checkbox"/>
Occupancy by families with disabilities	<input type="checkbox"/>
Occupancy by only elderly families and families with disabilities	<input type="checkbox"/>
3. Application status (select one)	
Approved; included in the PHA's Designation Plan	<input type="checkbox"/>
Submitted, pending approval	<input type="checkbox"/>
Planned application	<input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: <u>(DD/MM/YY)</u>	
5. If approved, will this designation constitute a (select one)	
<input type="checkbox"/> New Designation Plan	
<input type="checkbox"/> Revision of a previously -approved Designation Plan?	
6. Number of units affected:	
7. Coverage of action (select one)	
<input type="checkbox"/> Part of the development	
<input type="checkbox"/> Total development	

## 10. Conversion of Public Housing to Tenant -Based Assistance

[24 CFR Part 903.79(j)]

Exemptions from Component 10; Section 8 only PHAs are not required to complete this section.

**A. Assessment of Reasonable Revitalization Pursuant to section 202 of the HUD  
FY 1996 HUD Appropriations Act**

1. ☒ Yes ☐ No: Have any of the PHA's developments or portions of developments been identified by HUD or the PHA as covered under section 202 of the HUD FY 1996 HUD Appropriations Act? (If "No", skip to component 11; if "yes", complete one activity description for each identified development, unless eligible to complete a streamlined submission. PHAs completing streamlined submissions may skip to component 11.)

**2. Activity Description**

☒ Yes ☐ No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If "yes", skip to component 11. If "No", complete the Activity Description table below.

Conversion of Public Housing Activity Description
1a. Development name:
1b. Development (project) number:
2. What is the status of the required assessment? <input type="checkbox"/> Assessment underway <input type="checkbox"/> Assessment results submitted to HUD <input type="checkbox"/> Assessment results approved by HUD (if marked, proceed to next question) <input checked="" type="checkbox"/> Other <b>Financial Assessment Results Submitted with the Plan</b>
3. <input type="checkbox"/> Yes <input type="checkbox"/> No: Is a Conversion Plan required? (If yes, go to block 4; if no, go to block 5.)
4. Status of Conversion Plan (select the statement that best describes the current status) <input checked="" type="checkbox"/> Conversion Plan in development (Market Analysis) <input type="checkbox"/> Conversion Plan submitted to HUD on: (DD/MM/YYYY) <input type="checkbox"/> Conversion Plan approved by HUD on: (DD/MM/YYYY) <input type="checkbox"/> Activities pursuant to HUD - approved Conversion Plan underway
5. Description of how requirements of Section 202 are being satisfied by means other than conversion (select one) <input type="checkbox"/> Units addressed in a pending or approved demolition application (date submitted or approved: <input type="checkbox"/> Units addressed in a pending or approved HOPEVI demolition application

<div style="text-align: right;">(date submitted or approved:           )</div> <input type="checkbox"/> Units addressed in a pending or approved HOPE VI Revitalization Plan <div style="text-align: right;">(date submitted or approved:           )</div> <input type="checkbox"/> Requirements no longer applicable: vacancy rates are less than 10 percent <input type="checkbox"/> Requirements no longer applicable: site now has less than 300 units <input type="checkbox"/> Other: (describe below)
--

<b>B. Reserved for Conversions pursuant to Section 22 of the U.S. Housing Act of 1937</b>
---

<b>C. Reserved for Conversions pursuant to Section 33 of the U.S. Housing Act of 1937</b>
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## **11. Homeownership Programs Administered by the PHA**

[24CFR Part 903.79(k)]

Spokane Housing Authority is currently exploring the idea of Section 8 Homeownership through review of existing programs and HUD Regulations.

Spokane Housing Authority is in the development process of a homeownership program that involves new construction and lease to own. The proposed program is called "Welcome Home".

The following is a short overview and concept for the program:

**The dream of homeownership can be realized for up to 60% low-income families in Spokane County through "Welcome Home" a partnering between Spokane Housing Authority (SHA), Sterling Savings Bank, and the Federal Home Loan Bank (FHLB), Spokane Homeownership Resource Center (SHORC) the landowner, and the Builder.**

**"Welcome Home" is a lease to purchase homeownership program that will serve families from 60 to 80 percent of the median income in Spokane County. Construction and ownership will take place in three phases. There will be twenty homes in each phase, spanning a time period not longer than three years unless amended by SHA.**

**SHA will be the owner of the homes until the program resident assumes the FHA loan. The SHA down payment and closing costs will be provided through a Federal Home Loan Bank grant, which has been approved. The grants will not exceed \$10,000 per home and the benefit of the grant along with any remaining funds after down payment and closing costs from the \$10,000 grant will be passed**



onto the future homeowner. These remaining funds can be utilized by the future homeowner toward assumption costs.

### A. Public Housing

Exemptions from Component 11A: Section 8 only PHAs are not required to complete 11A.

1. ☐ Yes ☒ No: Does the PHA administer any homeownership programs administered by the PHA under an approved section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved HOPE I program (42 U.S.C. 1437aaa) or has the PHA applied or plan to apply to administer any homeownership programs under section 5(h), the HOPE I program, or section 32 of the U.S. Housing Act of 1937 (42 U.S.C. 1437z -4). (If "No", skip to component 11B; if "yes", complete one activity description for each applicable program/plan, unless eligible to complete a streamlined submission due to **small PHA** or **high performing PHA** status. PHAs completing streamlined submissions may skip to component 11B.)

### 2. Activity Description

- ☒ Yes ☐ No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? (If "yes", skip to component 12. If "No", complete the Activity Description table below.)

Public Housing Homeownership Activity Description (Complete one for each development affected)
1a. Development name: 1b. Development (project) number:
2. Federal Program authority: <input type="checkbox"/> HOPEI <input type="checkbox"/> 5(h) <input type="checkbox"/> Turnkey III <input type="checkbox"/> Section 32 of the USHA of 1937 (effective 10/1/99)
3. Application status: (select one) <input type="checkbox"/> Approved; included in the PHA's Homeownership Plan/Program <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: (DD/MM/YYYY)
5. Number of units affected: 6. Coverage of action: (select one) <input type="checkbox"/> Part of the development <input type="checkbox"/> Total development

## B. Section 8 Tenant Based Assistance

1. ☐ Yes ☒ No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982? (If "No", skip to component 12; if "yes", describe each program using the table below (copy and complete questions for each program identified), unless the PHA is eligible to complete a streamlined submission due to high performer status. **High performing PHAs** may skip to component 12.)

2. Program Description:

3. Size of Program

- ☐ Yes ☐ No: Will the PHA limit the number of families participating in the section 8 homeownership option?

If the answer to the question above was yes, which statement best describes the number of participants? (select one)

- ☐ 25 or fewer participants  
☐ 26–50 participants  
☐ 51 to 100 participants  
☐ more than 100 participants

4. PHA-established eligibility criteria

- ☐ Yes ☐ No: Will the PHA's program have eligibility criteria for participation in its Section 8 Homeownership Option program in addition to HUD criteria?  
If yes, list criteria below:

## **12. PHA Community Service and Self-Sufficiency Programs**

[24 CFR Part 903.79(l)]

Exemptions from Component 12: High performing and small PHAs are not required to complete this component. Section 8 - Only PHAs are not required to complete sub-component C.

**SHAs sponsor two major self-sufficiency programs: Family Self-Sufficiency (FSS), which was launched in 1995 and has been named "Independent Family Futures" (IFF), and the year-old Resident Opportunities and Self-Sufficiency (ROSS) Program. Participants are required to establish Individual Action Plans to attain self-reliance. Both programs link participants to community resources to enable them to achieve their self-sufficiency goals. Participants in both**

programs are also eligible to participate in the IFF Loan Program, in which they can access up to a \$300 loan to take care of obstacles to self-reliance, i.e., car repair etc.

Currently, 283 Section 8 participants and 30 Public Housing residents are enrolled in FSS/IFF. Fifty-five percent have escrow accounts. Two hundred have successfully completed the program. The ROSS Program has an enrollment of 39 families.

- Independent Family Futures (IFF) is the Spokane Housing Authority's (SHA's) Family Self-Sufficiency Program. IFF sub-programs include, but are not limited to, the IFF Loan Program, the Rent-a-Kid Summer Youth Employment Program, and the Volunteer Income Tax Assistance Program. We have on-site classes in money management and home ownership counseling. Currently, 322 families participate in IFF — 283 Section 8 and 39 Public Housing families. A total of 200 families have successfully completed their self-sufficiency goals in the IFF Program.
- At the end of 2001, 700 are on lease in the Welfare to Work Housing Choice Voucher Program. Each WtW family is required to develop a plan to attain self-sufficiency. SHA has established partnerships with over 20 community agencies that provide support services for these families.
- SHA has a Family Unification Voucher Program. Through an extensive network of partnerships, SHA is providing housing for families who have lost or are at risk of losing their child rent due to the lack of adequate housing. The partnership families will provide extensive case management to assist families in stabilization and self-sufficiency.
- SHA has recently implemented the ROSS — Resident Opportunities and Self-Sufficiency Program to serve our 75 scattered-site Public Housing families. The goal is to effectively connect program participants to community resources to attain economic self-reliance and to assist families to become experts at securing the services they need. Over 20 community organizations are assisting SHA with this program. At the end of 2001, 39 families had enrolled in ROSS.
- SHA has suspended the Community Service Requirement for Public Housing Residents effective 1/8/02, Board Resolution #370 [wa055n0 1]

## **A.PHA Coordination with the Welfare (TANF) Agency**

### **1. Cooperative agreements:**

☒ Yes ☐ No: Has the PHA entered into a cooperative agreement with the TANF Agency, to share information and/or target supportive services (as contemplated by section 12(d)(7) of the Housing Act of 1937)? [wa055h0 1]

If yes, what was the date that the agreement was assigned? 04/07/1999

2. Other coordination efforts between the PHA and TANF Agency (select all that apply)

- ☒ Client referrals
- ☒ Information sharing regarding mutual clients (for rent determinations and otherwise)
- ☒ Coordinate the provision of specific social and self-sufficiency services and program to eligible families
- ☐ Jointly administer programs
- ☒ Partner to administer a HUD Welfare-to-Work voucher program
- ☐ Joint administration of other demonstration program
- ☒ Other (describe)  
**Coordinate with the local child welfare agency to provide housing under the Family Unification Program**

**B. Services and programs offered to residents and participants**

**(1) General**

**a. Self-Sufficiency Policies**

Which, if any of the following discretionary policies will the PHA employ to enhance the economic and social self-sufficiency of assisted families in the following areas? (select all that apply)

- ☐ Public housing rent determination policies
- ☒ Public housing admissions policies
- ☒ Section 8 admissions policies
- ☐ Preference in admission to section 8 for certain public housing families
- ☐ Preferences for families working or engaging in training or education programs for non-housing programs operated or coordinated by the PHA
- ☐ Preference/eligibility for public housing homeownership option participation
- ☐ Preference/eligibility for section 8 homeownership option participation
- ☐ Other policies (list below)

**b. Economic and Social self-sufficiency programs**

☒ Yes ☐ No: Does the PHA coordinate, promote or provide any program to enhance the economic and social self-sufficiency of residents? (If "yes", complete the following table; if "no" skip to sub-component 2, Family Self Sufficiency Programs. The position of the table may be altered to facilitate its use.)

Services and Programs				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office/ PHA main office/ other provide name)	Eligibility (public housing or section 8 participants or both)
<i>ROSS</i>	<i>39</i>	<i>N/A</i>	<i>Main Office</i>	<i>Public Housing</i>
<i>IFF/FSS</i>	<i>322</i>	<i>Waiting List</i>	<i>Main Office, 3 County Offices</i>	<i>Both</i>
<i>Welfare to Work</i>	<i>700</i>	<i>Waiting List</i>	<i>Main Office</i>	<i>Section 8</i>
<i>Family Unification</i>	<i>35</i>	<i>Specific Criteria</i>	<i>Main Office</i>	<i>Section 8</i>

## (2) Family Self Sufficiency program/s

### a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2002 Estimate)	Actual Number of Participants (As of: 12/01/01)
Public Housing	6	39
Section 8	188	283

b. ☐ Yes ☐ No: If the PHA is not maintaining the minimum program size required by HUD, does the most recent FSS Action Plan address

the steps the PHA plan to take to achieve at least the minimum program size? N/A  
If no, list steps the PHA will take below:

### C. Welfare Benefit Reductions

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)

- ☒ Adopting appropriate changes to the PHA's public housing rent determination policies and train staff to carry out those policies
- ☒ Informing residents of new policy on admission and reexamination
- ☐ Actively notifying residents of new policy at times in addition to admission and reexamination.
- ☒ Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
- ☐ Establishing a protocol for exchange of information with all appropriate TANF agencies
- ☐ Other: (list below)

### D. Reserved for Community Service Requirement pursuant to section 12(c) of the U.S. Housing Act of 1937

## 13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.79(m)]

Exemptions from Component 13: High performing and small PHAs not participating in PHDEP and Section 8 Only PHAs may skip to component 15. High performing and small PHAs that are participating in PHDEP and are submitting a PHDEP Plan with this PHA Plan may skip to sub-component D.

### A. Need for measure to ensure the safety of public housing residents

1. Describe the need for measures to ensure the safety of public housing residents (select all that apply)

- ☐ High incidence of violent and/or drug -related crime in some or all of the PHA's developments
- ☐ High incidence of violent and/or drug -related crime in the area surrounding or adjacent to the PHA's developments
- ☐ Residents fearful for their safety and/or the safety of their children
- ☐ Observed lower -level crime, vandalism and/or graffiti
- ☐ People on waiting list unwilling to move into one or more developments due to perceived and/or actual level of violent and/or drug -related crime
- ☐ Other (describe below)

2. What information or data did the PHA use to determine the need for PHA actions to improve safety of residents (select all that apply).

- ☒ Safety and security survey of residents
- ☒ Analysis of crime statistics over time for crimes committed "in and around" public housing authority
- ☐ Analysis of cost trends over time for repair of vandalism and removal of graffiti
- ☒ Resident reports
- ☐ PHA employee reports
- ☒ Police reports
- ☒ Demonstrable, quantifiable success with previous or ongoing anti-crime/anti-drug programs
- ☐ Other (describe below)

2. Which developments are most affected?

**Parsons Apartments #WA19PO55001**

**75 Scattered - Site #WA19PO55002, 004, 006, 007**

### **B. Crime and Drug Prevention activities the PHA has undertaken or plan to undertake in the next PHA fiscal year**

1. List the crime prevention activities the PHA has undertaken or plan to undertake: (select all that apply)

- ☒ Contracting with outside and/or resident organizations for the provision of crime- and/or drug -prevention activities
- ☒ Crime Prevention Through Environmental Design
- ☒ Activities targeted to at-risk youth, adults, or seniors
- ☒ Volunteer Resident Patrol/Block Watchers Program
- ☐ Other (describe below)

2. Which developments are most affected? (list below)

**Parsons Apartments #WA19PO55001**

**75 Scattered - Site #WA19PO55002, 004, 006, 007**

### **C. Coordination between PHA and the police**

1. Describe the coordination between the PHA and the appropriate police precincts for carrying out crime prevention measures and activities: (select all that apply)

- ☒ Police involvement in development, implementation, and/or ongoing evaluation of drug -elimination plan

- ☒ Police provide crime data to housing authority staff for analysis and action
- ☒ Police have established a physical presence on housing authority property (e.g., community policing office, officer in residence)
- ☒ Police regularly testify in and otherwise support eviction cases
- ☒ Police regularly meet with the PHA management and residents
- ☐ Agreement between PHA and local law enforcement agency for provision of above-baseline law enforcement services
- ☐ Other activities (list below)

2. Which developments are most affected? (list below)

**Parsons Apartments #WA19PO55001**

#### **D. Additional information as required by PHDEP/PHDEP Plan**

PHA eligible for FY 2002 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

- ☐ Yes ☒ No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- ☐ Yes ☒ No: Has the PHA included the PHDEP Plan for FY 2002 in this PHA Plan?
- ☐ Yes ☒ No: This PHDEP Plan is an Attachment. (Attachment Filename: \_\_\_\_)

#### **14. Pet Policy**

Attachment [WA055e0 1]

#### **15. Civil Rights Certifications**

[24CFR Part 903.79(o)]

Civil rights certifications are included in the PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations.

#### **16. Fiscal Audit**

[24CFR Part 903.79(p)]

1. ☒ Yes ☐ No: Is the PHA required to have an audit conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h))?  
(If no, skip to component 17.)
2. ☒ Yes ☐ No: Was the most recent fiscal audit submitted to HUD?
3. ☐ Yes ☒ No: Were there any findings as the result of that audit?
4. ☐ Yes ☐ No: If there were any findings, do any remain unresolved?



5. ☐ Yes ☐ No: If yes, how many unresolved findings remain? \_\_\_\_  
Have response to any unresolved findings been submitted to HUD?  
If not, when are they due (state below )?

## **17. PHA Asset Management**

[24 CFR Part 903.79(q)]

Exemptions from component 17: Section 8 Only PHAs are not required to complete this component.  
High performing and small PHAs are not required to complete this component.

1. ☒ Yes ☐ No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock, including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs that have **not** been addressed elsewhere in this PHA Plan?
2. What types of asset management activities will the PHA undertake? (select all that apply)
- ☐ Not applicable
- ☐ Private management
- ☒ Development-based accounting
- ☒ Comprehensive stock assessment
- ☒ Other: (list below)  
**Development/Maintenance of Comprehensive Computerized Life Cycle Costing System**
3. ☒ Yes ☐ No: Has the PHA included descriptions of asset management activities in the **optional** Public Housing Asset Management Table?

### **Asset Management Narrative**

The Spokane Housing Authority defines asset management as the active and strategic pursuit of four long-term social, physical, and financial goals from predevelopment through the administration and disposition of a property or portfolio.

The functions of asset management include:

- Reporting and monitoring oversight
- Managing and Manager
  - Selecting the right property management
  - Negotiating a contract if outside management
  - Ongoing oversight

- Develop policies for asset and property management
- Goal setting and performance measurement
- Risk management
- Acquisition review
- Construction/Rehab involvement
- Consult on disposition
- Resident relations
- Ensure compliance

The Asset Manager has four important responsibilities:

1. Gathering and interpreting key information
2. Evaluating and performance of the property manager
3. Reporting and findings, conclusions and analysis to the Executive Director and Board of Commissioners as well as recommending actions
4. Proposing a budget for each property for the coming fiscal year

Specifically in Fiscal Year 2003:

- All properties will utilize site based budgeting
- A life -cycle replacement scheduled database is in development that will track the life cycle of building components and provide cost information for replacement based on the Means Book revised annually. It will be available to all staff at every community through the Internet Website. SHA will be able to add new communities and new components at existing facilities. This will allow for more accuracy in capital improvement planning at all SHA communities
- The Asset Manager will be involved in the review of potential developments for acquisition, construction/rehab or disposal
- A resident satisfaction survey will be conducted to form a baseline for improving resident relations

## **18. Other Information**

[24CFR Part 903.79(r)]

### **A. Resident Advisory Board Recommendations**

1. ☐ Yes ☒ No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?

**The RAB reviewed the proposed Agency Plan at their September 2001 and October 2001 meetings and no revisions were suggested.**

**Minutes from the RAB August 2001 meeting attached [wa055001]**

2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)

☐ Attached as Attachment (Filename)

☐ Provided below:

3. In what manner did the PHA address those comments? (select all that apply)

- ☐ Considered comments, but determined that no changes to the PHA Plan were necessary.
- ☐ The PHA changed portions of the PHA Plan in response to comments  
List changes below:
- ☐ Other: (list below)

### **B. Description of Election process for Residents on the PHA Board**

1. ☐ Yes ☒ No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)
2. ☐ Yes ☒ No: Was there a resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.)

### **3. Description of Resident Election Process**

a. Nomination of candidates for place on the ballot: (select all that apply)

- ☐ Candidates were nominated by resident and assisted family organizations
- ☐ Candidates could be nominated by any adult recipient of PHA assistance
- ☐ Self-nomination: Candidates registered with the PHA and requested a place on ballot
- ☒ Other:  
**Self-Nomination to the Mayor of the City of Spokane and Spokane County Commissioners**

b. Eligible candidates: (select one)

- ☐ Any recipient of PHA assistance
- ☐ Any head of household receiving PHA assistance
- ☒ Any adult recipient of PHA assistance
- ☐ Any adult member of a resident or assisted family organization
- ☐ Other (list)

c. Eligible voters: (select all that apply)

- ☐ All adult recipients of PHA assistance (public housing and section 8 tenant based assistance)
- ☐ Representatives of all PHA resident and assisted family organizations
- ☒ Other (list)  
**Mayor of the City of Spokane**

**Spokane City Counsel**  
**Spokane County Commissioners**

**C. Statement of Consistency with the Consolidated Plan**

For each applicable Consolidated Plan, make the following statement (copy questions as many times as necessary).

1. Consolidated Plan jurisdiction: City of Spokane, Spokane County, State of Washington
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
  - ☒ The PHA has based its statement of needs of families in the jurisdiction on the need expressed in the Consolidated Plan/s.
  - ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
  - ☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
  - ☒ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
  - ☐ Other: (list below)
4. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

**D. Other Information Required by HUD**

1. **Definition of "Substantial Deviation" and "Significant Amendment or Modification" to the Agency Plan:**

A Housing Authority is required to identify in its Annual Plan the basic criteria that will be used to determine what constitutes a "substantial deviation" from the Five Year plan and/or a "significant amendment or modification" to either the Five Year plan or the Annual plan.

After approval of the Agency Plan, a Housing Authority may not "substantially deviate" from its Five Year plan or implement any amendment or modification which is a "significant amendment or modification" to the Five Year and Annual plan until:

- The Resident Advisory Board has had the opportunity to review and make recommendations on the amendment or modification;
- The amendment or modification has been adopted at a duly called meeting of the Housing Authority Board of Commissioners; and,
- Notification of the amendment or modification, along with a copy of the recommendations made by the Resident Advisory Board and a description of the manner in which the Housing Authority addressed the recommendations, is submitted to HUD and approval is received from HUD.

The Spokane Housing Authority considers a “substantial deviation” or “significant amendment or modification” as a discretionary change in the plan or policy of the Housing Authority that fundamentally alters the mission, goals, objectives or plans of the Agency and which will require the formal approval of the Board of Commissioners. Specifically, the following will be considered to constitute a substantial deviation or significant amendment or modification:

- A material change in the policies regarding the manner in which tenant rent is calculated
- A material change in the admissions policies with respect to the selection of applicants from or organization of the waiting list
- Any change with regard to demolition or disposition, designation, home ownership programs or conversion activities not previously identified in the Agency Plan

An exception to this definition will be made only to the extent that the modification is the result of changes in HUD regulatory requirements; such changes will not be considered a substantial deviation or significant amendment or modification to either the Five Year or Annual Plans.

## **Attachments**

- A. AdmissionsPolicyforDeconcentration
- B. FY2002CapitalFundProgramAnnualStatement
- C. PublicHousingAssetManagementTable
- D. RABandResi dentMembershipofthePHAGoverningBoard
- E. PublicHousingPetPolicy
- F. FY2002CapitalFundProgram5 -YearActionPlan
- G. PHAMangementOrganizationalChart
- H. CooperativeAgreementBetweenPHAandTANFAgency
- I. FSSAnnualReport
- J. WelfaretoWorkStrategicPlan
- K. ConversionofPublicHousingtoTenant -BasedAssistanceMarketAnalysis
- L. ProgramChart
- M. OtherComments
- N. BoardResolutionSuspendingCommunityServiceRequirement
- O. RABMeetingMinutesAugust2001
- P. StatementofProgressinMeetingFive -YearPlanMissionandGoals

# ATTACHMENT F

## CapitalFundProgramFive -YearActionPlan

### PartI:Summary

PHANameSPOKANEHOUSING AUTHORITY				XOriginal5 -YearPlan <input type="checkbox"/> RevisionNo:	
Development Number/Name/HA- Wide	Year1	WorkStatementforYear2 FFYGrant:2003 PHAFY:2003	WorkStatementforYear3 FFYGrant:2004 PHAFY:2004	WorkStatementforYear4 FFYGrant:2005 PHAFY:2005	WorkStatementforYear5 FFYGrant:2006 PHAFY:2006
	Annual Statement				
55001/Parsons		28,000	20,000	42,000	55,000
55002/ScatteredSites		-0-	8,000	16,000	30,000
55004/ScatteredSites		-0-	2,400	8,000	8,000
55006/ScatteredSites		15,000	20,600	15,000	25,000
55007/ScatteredSites		-0-	2,000	-0-	2,000
55008/ScatteredSites		15,000	17,000	-0-	6,000
HAWide/Operations		129,000	90,000	129,000	84,000
HAWide/MgmtImpr		20,000	50,000	-0-	-0-
HAWide/Administr		23,000	20,000	20,000	20,000
CFPFundsListedfor 5-yearplanning		230,000	230,000	230,000	230,000
ReplacementHousing FactorFunds					

## CapitalFundProgramFive -YearActionPlan PartII:SupportingPages —WorkActivities

Activitiesfor Year1	ActivitiesforYear:_2003_ _ FFYGrant:2003 PHAFY:20 03			ActivitiesforYear:2004 FFYGrant:2004 PHAFY:2004		
	Development Name/Number	MajorWorkCategories	EstimatedCost	Development Name/Number	MajorWorkCategories	EstimatedCost
See	55001/Parsons	Newboilerandhot -water system	25,000	55001/Parsons	Upgrade/replacelock system	20,000
Annual	55001/Parsons	RecoatSidewalk	3,000	55002	Upgrade/replacelock system	8,000
Statement	55006	SewerAssessments& Connections	15,000	55004	Upgrade/replacelock system	2,400
	55008	SewerAssessments& Connections	15,000	55006	Upgrade/replacelock system	5,600
				55007	Upgrade/replacelock system	2,000
				55008	Upgrade/replacelock system	2,000
	HAWIDE –Mgmt Improvements	Newinventorycontrol system(bar -coded)	20,000	55006	Countysewerassessment andconnectio n –2units	15,000
				55008	Countysewerassessment andconnection –2units	15,000
				HAWIDE	Operations	90,000
	HAWIDE	Operations	129,000	HAWIDE –Mgmt Improvements	UpgradeLifeCycle CostingSoftwareSystem	50,000
	HAWIDE	Administration	23,000	HAWIDE	Administration	20,000
TotalCFPEstimatedCost			\$230,000			\$230,000



## CapitalFundProgramFive -YearActionPlan PartII:SupportingPages —WorkActivities

[illegible]

# AttachmentB

## AnnualStatement/PerformanceandEvaluationReport

### CapitalFundProgramandCapitalFundProgramReplacementHousingFactor(CFP/CFPRHF)PartI:Summary

PHAName:SPOKANEHOUSINGAUTHORITY		GrantTypeandNumber CapitalFundProgramGrantN o: WA19P055501-00 ReplacementHousingFactorGrantNo:			FederalFYofGrant: 2000
OriginalAnnualStatement <input type="checkbox"/> ReserveforDisasters/EmergenciesXXRevisedAnnualStatement(revisionno:3 ) XPerformanceandEvaluationReportforPeriodEnding:12/31/2001 <input type="checkbox"/> FinalPerformanceandEvaluationReport					
Line No.	SummarybyDevelopmentAccount	TotalEstimatedCost		TotalActualCost	
		Original	Revised	Obligated	Expended
1	Totalnon -CFPFunds				
2	1406Operations	13,600	36,272	15,000	15,000
3	1408ManagementImpro vements	-0-	-0-	-0-	-0-
4	1410Administration	15,916	15,916	12,000	12,000
5	1411Audit				
6	1415LiquidatedDamages				
7	1430FeesandCosts	-0-	-0-	-0-	-0-
8	1440SiteAcquisition				
9	1450SiteImprovement	38,000	30,995	8,995	8,545
10	1460DwellingStructures	154,000	137,333	113,333	100,627
11	1465.1DwellingEquipment —Nonexpendable	8,850	8,850	8,850	8,850
12	1470NondwellingStructures				
13	1475NondwellingEquipment				
14	1485Demolition				
15	1490ReplacementReserve				
16	1492MovingtoWorkDemonstration				
17	1495.1RelocationCosts	-0-	1,000	1,000	-0-
18	1499DevelopmentActivities				
19	1501CollaterizationorDebtService				
20	1502Contingency				
21	AmountofAnnualGrant:(sumoflines2 –20)	230,366	230,366	159,178	145,022
22	Amountoffline21RelatedtoLBPActivities				
23	Amountoffline21RelatedtoSection504compliance				
24	Amountoffline21RelatedtoSecurity –SoftCosts				
25	AmountofLine21RelatedtoSecurity – HardCosts	15,000	15,000	-0-	-0-
26	Amountoffline21RelatedtoEnergyConservationMeasures				

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part II: Supporting Pages**

PHAN ame: SPOKANEHOUSINGAUTHORITY		<b>Grant Type and Number</b> Capital Fund Program Grant No: WA19P055501-00 Replacement Housing Factor Grant No:				Federal FY of Grant: 2000		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
55001	Air Handling System Study	1430	1	0	0	0	0	Postponed
55001	Handicapped Kitchen Remodels	1460	2	0	0	0	0	Postponed
55001	Temporary Tenant Relocation	1495.1	1	0	1,000	1,000	0	Contracted
55001	Paint stairways and vestibules	1460	1	3,000	3,000	0	0	Out for Bid
55001	Replace security call -system	1460	1	15,000	15,000	0	0	Out for Bid
55001	Replace ADA Showers	1460	2	5,000	8,500	8,500	0	Precontract
55001	Replace carpeting in 12 units	1460	12	6,000	6,000	0	0	Out for Bid
55002	Landscaping and fencing	1450	9	12,400	11,400	0	0	Precontract
55002	Replace & install as indicated by Life Cycle Costing System: decks, siding, roofs, furnaces, garage doors	1460	26	63,500	54,392	54,392	52,149	Some Completed and some moved to 1406
55002	Replace as indicated by Life Cycle Costing System: ranges, refrigerators, water heaters	1465.1	9	2,500	2,500	2,500	2,500	Completed
55004	Replace & install as indicated by Life Cycle Costing System: decks, siding, roofs, furnaces, garage doors	1460	9	14,500	9,336	9,336	9,055	Completed and moved to 1406
55004	Landscaping & Fencing	1450	4	11,600	10,600	0	0	Postponed
55004	Replace as indicated by Life Cycle Costing System: ranges, refrigerators, water heaters	1465.1	4	1,500	1,500	1,500	1,500	Completed
55006	Replace & install as indicated by Life Cycle Costing System: decks, siding, roofs, floor coverings, furnaces, garage doors	1460	18	29,000	28,025	28,025	26,903	Completed

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part II: Supporting Pages**

PHAN ame: SPOKANEHOUSINGAUTHORITY		<b>Grant Type and Number</b> Capital Fund Program Grant No: WA19P055501-00 Replacement Housing Factor Grant No:				Federal FY of Grant: 2000		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
55006	Replace as indicated by Life Cycle Costing System: ranges, refrigerators, water heaters	1465.1	6	2,000	2,000	2,000	2,000	Completed
55006	Landscaping & fences	1450	4	14,000	8,995	8,995	8,545	Completed
55007	Replace & install as indicated by Life Cycle Costing System: decks, siding, roofs, floor coverings, furnaces, garage doors	1460	7	8,000	0	0	0	Moved to 1406
55007	Replace as indicated by Life Cycle Costing System: ranges, refrigerators,	1465.1	7	2,000	2,000	2,000	2,000	Completed
55007	Landscaping & fences	1450	1	0	0	0	0	Postponed
55008	Replace & install as indicated by Life Cycle Costing System: decks, siding, roofs, floor coverings, furnaces, garage doors	1460	7	10,000	13,080	13,080	12,520	Completed
55008	Landscaping & fences	1450	1	0	0	0	0	Postponed
55008	Replace as indicated by Life Cycle Costing System: ranges, refrigerators,	1465.1	3	850	850	850	850	Completed
HAWIDE	ADMINISTRATION	1410		15,916	15,916	12,000	12,000	Work in Process
HAWIDE	OPERATIONS	1406		13,600	36,272	15,000	15,000	Work in Process
HAWIDE	MANAGEMENT IMPROV.	1408		0	0	0	0	

**AnnualStatement/PerformanceandEvaluationReport****CapitalFundProgramandCapitalFundProgramReplacementHousingFactor(CFP/CFPR HF)****PartIII:ImplementationSchedule**

PHAName:SPOKANEHOUSING AUTHORITY			<b>GrantTypeandNumber</b> CapitalFundProgramNo: WA19P055501-00 ReplacementHousingFactorNo:			<b>FederalFYofGrant: 2000</b>	
DevelopmentNumber Name/HA-Wide Activities	AllFundObligated (QuarterEndingDate)			AllFundsExpended (QuarterEndingDate)			ReasonsforRevisedTargetDates
	Original	Revised	Actual	Original	Revised	Actual	
55001	3/31/2002			9/30/2002			
55002	3/31/2002			9/30/2002			
55004	3/31/2002			9/30/2002			
55006	3/31/2002			9/30/2002			
55007	3/31/2002			9/30/2002			
55008	3/31/2002			9/30/2002			
HAWIDE	3/31/2002			9/30/2002			

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary

PHAName: SPOKANE HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: WA19P055501-01 Replacement Housing Factor Grant No:		Federal FY of Grant: 2001	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement (revision no: ) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 12/31/01 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non - CFP Funds				
2	1406 Operations	57,427		4,000	4,000
3	1408 Management Improvements				
4	1410 Administration	23,480		5,000	5,000
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement	14,000		-0-	-0-
10	1460 Dwelling Structures	133,089		-0-	-0-
11	1465.1 Dwelling Equipment — Nonexpendable	6,800		-0-	-0-
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	234,796		9,000	9,000
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security — Soft Costs				
25	Amount of Line 21 Related to Security — Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part II: Supporting Pages**

PHAName: SPOKANEHOUSINGAUTHORI TY		GrantTypeandNumber CapitalFundProgramGrantNo: WA19P055501-01 ReplacementHousingFactorGrantNo:				FederalFYofGrant: 2001		
Development Number Name/HA-Wide Activities	GeneralDescriptionofMajorWork Categories	Dev.AcctN o.	Quantity	TotalEstimatedCost		TotalActualCost		Statusof Work
				Original	Revised	Funds Obligated	Funds Expended	
55001	Pointexteriorbricks&repairstucco	1460	1	5,000				
55002	Replace&installasindicatedbyLife CycleCostingSystem:de cks,siding, roofs,floorcoverings	1460	5	19,815				
55002	ReplaceasindicatedbyLifeCycle CostingSystem:ranges,refrigerators, waterheaters	1465.1	6	1,810				
55002	Replacefences,5units	1450	5	10,000				
55004	Replace&installasindicate dbyLife CycleCostingSystem:decks,siding, roofs,floorcoverings	1460	7	24,917				
55004	ReplaceasindicatedbyLifeCycle CostingSystem:ranges,refrigerators, waterheaters	1465.1	5	1,360				
55006	Replace&installasindicatedbyLife CycleCostingSystem:decks,siding, roofs,floorcoverings	1460	9	31,322				
55006	ReplaceasindicatedbyLifeCycle CostingSystem:ranges,refrigerators, waterheaters	1465.1	6	1,810				
55007	Replace&installasindicatedbyLife CycleCostingSystem :decks,siding, roofs,floorcoverings	1460	8	29,920				
55007	ReplaceasindicatedbyLifeCycle CostingSystem:ranges,refrigerators, waterheaters	1465.1	3	910				

**AnnualStatement/PerformanceandEvaluationReport**  
**CapitalFundProgramandCapitalFundProgramReplacementHousingFactor(CFP/CFPRHF)**  
**PartII:SupportingPages**

PHAName: SPOKANEHOUSINGAUTHORI TY		GrantTypeandNumber CapitalFundProgramGrantNo: WA19P055501-01 ReplacementHousingFactorGrantNo:				FederalFYofGrant: 2001		
Development Number Name/HA-Wide Activities	GeneralDescriptionofMajorWork Categories	Dev.AcctN o.	Quantity	TotalEstimatedCost		TotalActualCost		Statusof Work
				Original	Revised	Funds Obligated	Funds Expended	
55008	Replace&installasindicatedbyLife CycleCostingSystem:decks,siding, roofs,floorcoverings	1460	6	22,115				
55008	ReplaceasindicatedbyLifeCycle CostingSystem:ranges,refrigerators, waterheaters	1465.1	3	910				
55008	Replacefences,2units	1450	2	4,000				
HAWIDE	Operations(Salaries,Maintenance, ApplianceReplacement,Repairs)	1406		57,427		4,000	4,000	InProgress
HAWIDE	Administration	1410		23,480		5,000	5,000	InProgress



**AnnualStatement/PerformanceandEvaluationReport****CapitalFundProgramandCapitalFundProgramReplacementHousingFactor(CFP/CFPRHF)****PartIII:ImplementationSchedule**

PHAName:SPOKANEHOUSING AUTHORITY			<b>GrantTypeandNumber</b> CapitalFundProgramNo: WA19P055501-01 ReplacementHousingFactorNo:			<b>FederalFYofGrant:</b> 2001	
DevelopmentNumber Name/HA-Wide Activities	AllFundObligated (QuarterEndingDate)			AllFundsExpended (QuarterEndingDate)			ReasonsforRevisedTargetDates
	Original	Revised	Actual	Original	Revised	Actual	
55001	3/31/2003			9/30/2004			
55002	3/31/2003			9/30/2004			
55004	3/31/2003			9/30/2004			
55006	3/31/2003			9/30/2004			
55007	3/31/2003			9/30/2004			
55008	3/31/2003			9/30/2004			
HAWIDE	3/31/2003			9/30/2004			

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary

PHAName: SPOKANE HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: WA19P055501-02 Replacement Housing Factor Grant No:		Federal FY of Grant: 2002	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement (revision no: ) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 12/31/01 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non -CFP Funds				
2	1406 Operations	99,796		-0-	-0-
3	1408 Management Improvements				
4	1410 Administration	15,000		-0-	-0-
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement	20,000		-0-	-0-
10	1460 Dwelling Structures	100,000		-0-	-0-
11	1465.1 Dwelling Equipment — Nonexpendable			-0-	-0-
12	1470 Non dwelling Structures				
13	1475 Non dwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	234,796		-0-	-0-
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security — Soft Costs				
25	Amount of Line 21 Related to Security — Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

**AnnualStatement/PerformanceandEvaluationReport**  
**CapitalFundProgramandCapitalFundProgramReplacementHousingFactor(CFP/CFPRHF)**  
**PartII:SupportingPages**

[illegible]

**AnnualStatement/PerformanceandEvaluationReport**  
**CapitalFundProgramandCapitalFundProgramReplacementHousingFactor(CFP/CFPRHF)**  
**PartIII:ImplementationSchedule**

[illegible]

## AttachmentC

### OptionalPublicHousingAssetManagementTable

SeeTechnicalGuidanceforinstructions ontheuseofthistable,includinginformationtobeprovided.

PublicHousingAssetManagement								
Development Identification		ActivityDescription						
Name, Number, and Location*	Number and Type of units	Capital Fund Program Parts II and III Component 7a	Development Activities Component 7b	Demolition/ disposition Component 8	Designated housing Component 9	Conversion Component 10	Home-ownership Component 11a	Other (describe) Component 17
55001	50-MFR	\$100,000(3/31/04 -9/30/05)	NA	NA	NA	NA	NA	NA
55002	30-SFR	0	NA	NA	NA	NA	NA	NA
55004	10-SRF	0	NA	NA	NA	NA	NA	NA
55006	21-Mixed	\$10,000	NA	NA	NA	NA	NA	NA
55007	7-Mixed	0	NA	NA	NA	NA	NA	NA
55008	7-Mixed	\$10,000	NA	NA	NA	NA	NA	NA
HAWIDE	NA	\$114,796	NA	NA	NA	NA	NA	NA

\*55001,55002,55004&55007alllocatedinCityofSpokane

\*55006&55008alllocatedinSpokaneCounty

## **ATTACHMENTD**

### **RESIDENTMEMBERSHIPOFTHEPHAGOVERNINGBOARD**

<b>Name</b>	<b>Appointment</b>	<b>TermExpirationDate</b>
JuliaRahmaan	June16,1998	March15,2006

AppointedbytheMayoroftheCityofSpokaneandSpokaneCountyCommissioners

### **RESIDENTADVISORY BOARDMEMBERS**

Mr. John Zichko  
1115W.FirstAve.,#221  
Spokane,WA 99201

Ms. Ann Watkins  
108S.Jefferson,#406  
Spokane ,WA 99201

Mr. J.P. Swim  
608S.GreenStreet  
Spokane,WA 99202

Ms. Rhea Coble  
2007N.Ash,Apt.11  
Spokane,WA 99205-4295

Ms. Lisa Zolman  
1722E.Boone  
Spokane,WA 99202

Mr. Rich Graham  
108S.Jefferson,#100  
Spokane,WA 99201

Ms. Theresa Reilly  
2718N.Bowdish  
Spokane,WA 99206

Mr. Cecil Milam  
3827E.Pratt  
Spokane,WA 99202

Ms. KristineR. Maxwell  
1414W.CoraCt.  
Spokane ,WA 99205

Ms. Colleen Larson  
7800E.Alki,Space9  
Spokane,WA 99212

Ms. Traci Nelson  
2903E.Joseph  
Spokane,WA 99207

Ms. Agnes Broucheau  
1815E.10th  
Spokane,WA 99202

## **ATTACHMENTE**

### **SHAPUBLICHOUSINGP ETPOLICY**

#### ***EXCLUSIONS***

This policy does not apply to animals that are used to assist persons with disabilities. Assistive animals are allowed in all public housing facilities with no restrictions other than those imposed on all tenants to maintain their units and associated facilities in a decent, safe, and sanitary manner and to refrain from disturbing their neighbors.

#### ***PETSINPUBLICHOUSINGPROJECTS***

The Spokane Housing Authority will allow for pet ownership in all units designated for use by elderly and/or disabled families in any project or building. The Authority also allows pets in its scattered site family units in accordance with the terms of this policy.

#### ***APPROVAL***

Residents must have the prior approval of the Housing Authority before moving a pet into their unit. Residents must request approval on the Authorization for Pet Ownership Form that must be fully completed before the Housing Authority will approve the request.

#### ***TYPESANDNUMBEROF PETS***

The Spokane Housing Authority will allow only domesticated dogs, cats, birds, and fish in aquariums in units. All dogs and cats must be neutered and spayed. All animals must be indoor pets only.

Only one (1) pet or aquarium per unit is allowed.

Any animal deemed to be potentially harmful to the health or safety of others, including attack or fight trained dogs, will not be allowed.

No animal may exceed thirty (30) pounds in weight.

#### ***INOCULATIONS***

It is the responsibility of the resident to secure for their pet appropriate licensing and inoculations against rabies and other conditions prescribed by local ordinances.

***PET DEPOSIT***

- A. A pet deposit of \$100.00 is required at the Parsons Apartments at the time of registering a pet. The deposit is refundable when the pet or the individual/family vacate the unit, less any amounts owed due to damage beyond normal wear and tear.
- B. A pet deposit of \$250.00 is required for the scattered site units. The deposit is refundable when the pet and/or family/individual vacate the unit, less any amounts owed due to damage beyond normal wear and tear.

Note: In either instance, should the cost of correcting pet -caused damages exceed the deposit amount, such additional cost must be paid by the resident.



## ATTACHMENT A

### DECONCENTRATION POLICY

It is Spokane Housing Authority's policy to provide for deconcentration of poverty and encourage income mixing by bringing higher income families into lower income developments and lower income families into higher income developments. Spokane Housing Authority has only 125 units of Public Housing: the Parsons Apartments a 50 unit complex located in the downtown area and 75 scattered site units located in all areas of the City and County. Spokane Housing does feel that by virtue of location we accomplish deconcentration of poverty. We will however, skip families on the waiting list to reach other families with a lower or higher income should a situation/need arise. We will accomplish this in a uniform and non-discriminating manner.

The Spokane Housing Authority will affirmatively market our housing to all eligible income groups. Lower income residents will not be steered toward lower income developments and higher income people will not be steered toward higher income developments. Spokane Housing Authority will inform Section 8 Housing Choice Voucher holders of the full range of units located outside areas of poverty and minority concentrations and of the full range of units both inside and outside the SHA jurisdiction. SHA will provide a list of landlords and other parties who are willing to participate in the program.

The Spokane Housing Authority will continue to encourage participation of owners of units located outside of areas of poverty and minority concentrations through continued support of the SHA Landlord Advisory Committee. SHA will maintain membership in the Inland Empire Rental Association and continue monthly submissions of articles on the Section 8 Housing Choice Voucher Program for publication in its newsletter and SHA will continue quarterly publication of the SHA Landlord Liaison Newsletter.

Prior to the beginning of each fiscal year, we will analyze the income levels of families residing in each of our four developments, the income levels of census tracts in which our developments are located, and the income levels of the families on the waiting list. Based on this analysis, we will determine the level of marketing strategies and deconcentration incentives to implement.

# AttachmentG

## SpokaneHousingAuthority2002

SHA RESIDENTS AND PARTICIPANTS

Board of Commissioners

Winston & Cashatt  
Legal Counsel

**DianneM.Quast**  
ExecutiveDirector

Kathleen Robertson  
Exec. Admin. Assistant

Property Management  
Department  
See Reverse  
for Org Chart

Sharon Lord  
Operations Director

Lonnie Gallo-Pierce  
Development Director

Cynthia Weiser  
Finance & Admin. Services Director

Elaine Mullane  
Operations Manager

Gary Atchison  
Operations Manager

Cindy Algeo  
Operations Manager

Art Noll  
Development Specialist

Vacant  
Accountant II

Kim Metzler  
Accountant I

Damon Beetham  
Data Systems Specialist

Lyle Butters  
Admin  
Services Supervisor

Rhett Ennis  
Accounting Intern

Jonathan Harit  
Office Assistant

Ruth Lauersen  
Occupancy Supervisor

Dick Culton  
Occupancy Supervisor

Heidi Thome  
Rural Occupancy  
Specialist

Robert Rodgers  
Occupancy  
Supervisor

Jamie Walker  
Occupancy Supervisor

Linda Case  
Occupancy Supervisor

RaNae Brooks-Sonduck  
Eligibility Specialist

Kim Perkins  
HQS Specialist

Kimberly Putnum  
Eligibility Specialist

Corina Moser  
Eligibility Specialist

Jana Frantz  
Eligibility Specialist

Christy Mathews  
Eligibility Specialist

Nancy Colgrove  
Receptionist

Cheryl Thompson  
Receptionist

Lori Westerman  
HQS Specialist

Peggy Minnaugh  
Rural Occupancy  
Specialist

Madonna Plourd  
1/2 Eligibility  
Specialist

Vacant  
1/2 FSS Specialist

Whitman County CAC  
Section 8  
Administration

Laurie Albin-McMillan  
Eligibility Specialist

Patti Gates  
Contract Specialist

Roy Pluid  
Contract Specialist

Kelly Yank  
Eligibility Specialist

Doug Leonetti  
HQS Specialist

Ellie Christianson  
ROSS Coordinator

Joe Cheesman  
HOPWA Coordinator

Deanna Dellinger  
Eligibility Specialist

Tyann Larson  
Eligibility Specialist

Fred Harvey  
HQS Specialist

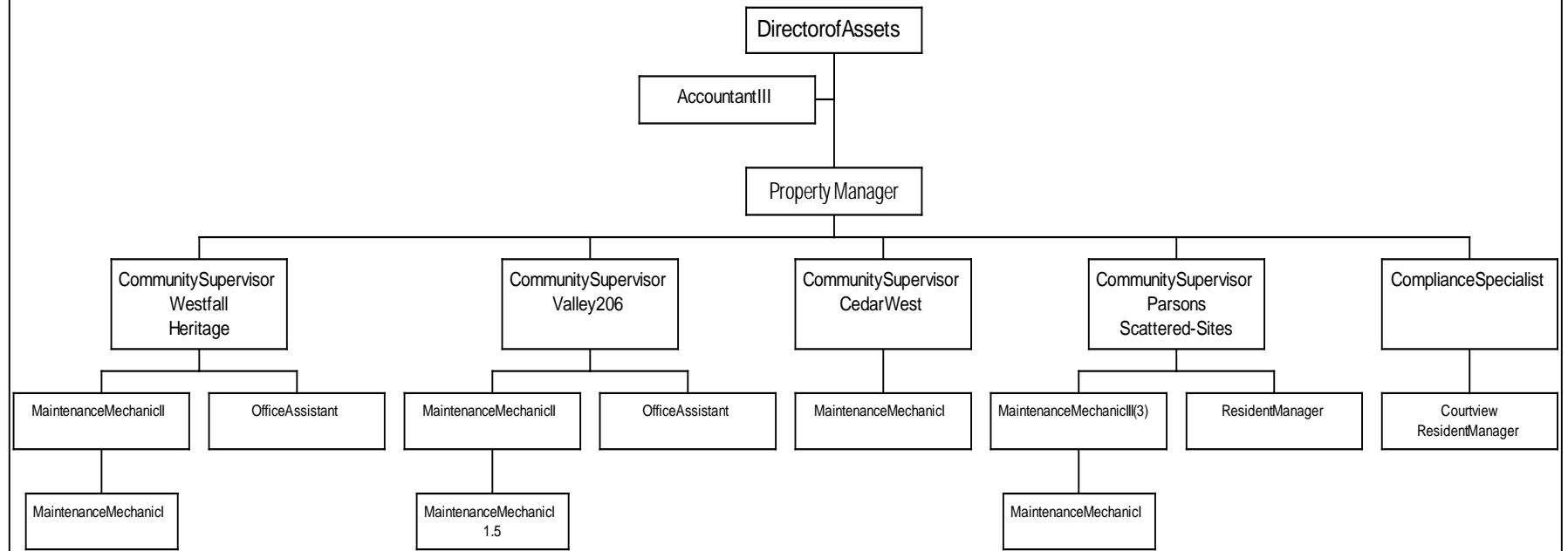
Jennifer Balasz  
FSS Specialist

Laura Freeman  
FSS Specialist

Trudy Kern  
Eligibility Specialist

Rich St. Andrew  
HQS Specialist

## SHAPropertyManagementDepartment



## ATTACHMENTH

### **Cooperation Agreement for Economic Self-Sufficiency Between the Spokane Housing Authority and Region I Dept. of Social and Health Services Community Services Division**

#### **Memorandum of Agreement**

This Memorandum of Agreement (MOA) is entered into between the Spokane Housing Authority (SHA), a governmental entity corporation, and Region I Dept. of Social and Health Services Community Services Division (DSHS). The parties agree to the following:

The Quality Housing and Work Responsibility Act of 1998 (QHWRA) envisions that SHA and DSHS will target services to families who receive housing assistance, and will work together to help these families to become self-sufficient.

SHA and DSHS recognize the significant overlap in the population receiving welfare assistance and living in public housing or receiving Section 8 tenant-based assistance.

SHA and DSHS recognize that these families have the potential to succeed and become economically self-sufficient where adequate supportive services are provided.

SHA and DSHS recognize that coordinated administrative practices support participant self-sufficiency, and it is in the best interest of all concerned parties to coordinate efforts aimed at jointly assisting these families in becoming economically self-sufficient.

SHA and DSHS recognize the need for a streamlined process to collect, verify and provide information as necessary to either party in a timely manner to ensure efficient delivery of service, and to detect and deter participant fraud and program noncompliance.

#### **Purpose of Memorandum of Agreement**

The purpose of this MOA is to carry out, on a local level, Sec. 512(d)(7) of QHWRA, which requires that SHA and DSHS identify common goals and purposes that support the economic self-sufficiency efforts of low-income families receiving welfare assistance and living in public housing or receiving Section 8 tenant-based assistance. SHA and DSHS agree to the following goals:

- 1) Targeting services and resources to families to assist them in achieving economic self-sufficiency, including, but not limited to, pre and post employment and training activities, job search activities, job development, case management, mentoring, counseling, childcare, and transportation.
- 2) Coordinating and streamlining the administrative functions to ensure the efficient delivery

of services to families. This includes coordination of resources and program activities, identification of eligible participants and coordination of verification of information to determine program eligibility. ADSHS representative has sat, and will continue to sit, on the combined advisory board for SHA's Family Self-Sufficiency program (FSS), Welfare-to-Work Housing Voucher program (W-t-W), and the Resident Opportunities and Self-Sufficiency program (ROSS). SHA staff will continue to update, on a quarterly basis, the Community Services Offices staff on the implementation of W-t-W, FSS and ROSS.

- 3) Reducing and discouraging fraud and noncompliance with welfare and housing program requirements by providing information to reward work and promote compliance. DSHS and SHA have implemented a jointly developed process to

A. verify if a family in public housing or receiving Section 8 assistance is receiving welfare benefits/assistance.

B. verify if a family in public housing is eligible for a "disallowance of earned income from rent determination," as allowed in QHWRRA, Sec. 508(d).


C. verify if a family in public housing or receiving Section 8 assistance that has a decrease in welfare income may have their rent decreased. DSHS ensures that SHA has information whether the family's welfare benefits/assistance has been reduced or terminated due to fraud or noncompliance with welfare program rules and regulations.

D. Verify if adult members of a family in public housing are exempt from Community Service—required by QHWRRA, because they are engaged in a work activity as defined by the Social Security Act, or under the Washington State welfare program.

(See also, Attachment A, Data Sharing Agreement)

Both parties fully understand and agree to the roles and responsibilities outlined in this agreement.


Spokane Housing Authority

  
Dianne M. Quast, Executive Director

Date

8/1/00

Region 1 DSHS Community Services Div.

  
Region 1 Official

Date

8/1/00

**DATA SHARING AGREEMENT  
BETWEEN  
THE DEPARTMENT OF SOCIAL AND HEALTH SERVICES,  
COMMUNITY SERVICES DIVISION(CSD)  
AND  
WASHINGTON STATE HOUSING AUTHORITIES**

**AGENCY PROVIDING DATA**

AGENCYNAME: CommunityServicesDivision(CSD)  
CONTACTPERSON: DaveMonfort  
TITLE: ConstituentRelationsVerificationManager  
ADDRESS: P.O.Box45440  
PHONENUMBER: Olympia.WA98504-5440  
FAXNUMBER: (360)413-3339  
(360)413-3491

**AGENCY RECEIVING DATA**

AGENCYNAME:  
CONTACTPERSON:  
TITLE:  
ADDRESS: SpokaneCityHousingAuthority  
PHONENUMBER: MaryJoHarvey  
FAXNUMBER: ExecutiveDirector  
W55Mission,Ste104,Spokane,WA99201  
(509)328-2953  
(509)327-5246

**SCOPEANDPURPOSEOFAGREEMENT**

**A.PURPOSE**

ThepurposeofthisdatasharingagreementistoprovideWashingtonHousing  
Authoritiesspecificpublicassistanceclientfinancialinformationfromthe  
followingprogramareastoverifyclienteligibilityforsubsidizedhousing:

Medicaid  
MedicalOnly  
FoodStamps  
AidtoFamilieswithDependentChildren/TemporaryAssistanceto  
NeedyFamilies  
GeneralAssistance  
RefugeeAssistance

The information will be used to administer Housing and Urban Development (HUD) programs for low income housing assistance.

#### **B. PERIOD OF AGREEMENT**

This agreement shall be effective upon the signature of both the parties to this agreement effective January 1, 2000 and continue until December 31, 2003.

#### **JUSTIFICATION FOR ACCESS**

Access to client financial information is used by the above Washington Housing Authority to determine benefit level for Housing and Urban Development (HUD) low income housing assistance under the authority of 45 RCW 205.50(a)(1)(i)(C) which states:

A State plan for financial assistance under title IV-A of the Social Security Act, .... must provide that. .. The use or disclosure of information concerning applicants and recipients will be limited to purposes directly connected with... The administration of any other Federal or federally assisted program which provides assistance, in cash or in kind, or services, directly to individuals on the basis of need.

#### **DESCRIPTION OF DATA SHARED**

The above Washington Housing Authority will provide DSHS with the following client information:

- \* Client Name

- \* Client Social Security Number and/or client case number or client identification number.

- \* Month/Year of information needed

DSHS will provide the Washington Housing Authority the following client financial information:

- \* The number of persons in the DSHS household.

- \* The mailing address.

- \* The month/year, type, and amount of benefit issued by DSHS.

- \* The month/year, type, and amount of other income and/or benefit reported to DSHS.

#### **ACCESS TO DATA**

The above Washington Housing Authority will provide needed client information in one of two ways:

- Telephone DSHS on the Toll Free Number (1-800-795-2518) to verify current client information for applicants.

Either mail to the above address or send a Facsimile to (360) 413-3491 a list of clients with the required information to DSHS on a monthly basis for annual reviews conducted by the Washington Housing Authority.

DSHS will provide an oral response to the telephoned requests for current information and a written response to the monthly lists received that include the identified data elements and mail back to the Washington Housing Authority.

## V. CONFIDENTIALITY

### A. REGULATIONS COVERING CONFIDENTIALITY OF DATA

This agreement is entered into pursuant to the Provision of RCW 74.04.060.

This regulation states in part: Information about recipient shall not be disclosed except for purposes directly connected with the administration of the programs for which the data was collected.

It further states: That any information so obtained by such persons or groups shall be treated with such degree of confidentiality as is required by the federal social security law.

Other regulations pertinent to this agreement are:

RCW 42.17.310(1)(a)

Section 1902(a)(7) of Title XIX of the Social Security Act

Section 402(a)(9) of Title IV of the Social Security Act.

Section 11(e) of the Food Stamp Act of 1977

7 CFR 272.1(c) 205.50

45 CFR 205.50

42 CFR 431.301

WAC 388-320-235

### B. ACCESS TO DATA

Access to the public assistance client income information shall be limited to Washington Housing Authority staff whose duties specifically require access to such data to determine eligibility and payment level of HUD housing assistance.

### C. NON-DISCLOSURE OF DATA

Washington Housing Authorities shall not disclose, in whole or part, the data described in this agreement to any individual or agencies not specifically authorized under

"ACCESS TO DATA" above.



#### D. PENALTIES FOR UNAUTHORIZED DISCLOSURE OF DATA

Violation of the non-disclosure provision of this agreement may result in criminal or civil penalties. RC W74.04.060 states: The violation of this section shall be a gross misdemeanor, punishable by imprisonment of not more than one year and/or a fine not to exceed five thousand dollars.

CSD may immediately terminate this agreement if it is determined that the provisions of this agreement are not being met.

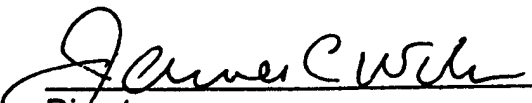
#### E. EMPLOYEE AWARENESS OF USE/DISCLOSURE REQUIREMENTS

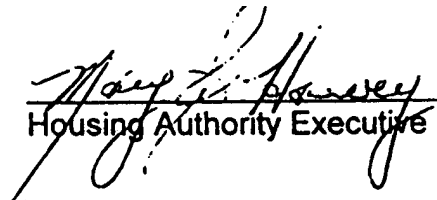
Washington Housing Authorities shall assure that all Housing Authority staff with access to the microfiche are aware of the use and disclosure of the information as follows:

1. Prior to making the microfiche available, notify all staff with access to the information contained of the use and disclosure requirement and the penalties for unauthorized use/disclosure. These are found in Appendix A.
2. Advise each new staff of provisions in 1. above and provide an annual reminder to all other staff.
3. The Washington Housing Authorities may publish the requirements and penalties in policy or procedure manuals, provided such manuals are available to all staff with access to the microfiche.

#### AMENDMENTS AND ALTERATIONS TO THIS AGREEMENT

The Community Services Division and the Washington Housing Authorities may mutually amend and/or alter this agreement at any time with two weeks notice, but it must be in writing and signed by authorized staff.

  
\_\_\_\_\_  
Director  
Community Services Division

  
\_\_\_\_\_  
Housing Authority Executive Director

FSS Annual Progress Report

Spokane, Stevens and Pend Oreille Counties

HA: Spokane Housing Authority				Annual Report		
Coordinators: Cindy Algeo, Jennifer Balaszi				Period Ending		
Phone: 509-252-7133 or 509-252-7126				9 / 30 / 01		
	This Report Period			Cumulative		
1. FSS program Size:	SCB	PH	Total	SCB	PH	Total
Minimum FSS program size based on units received **				163	6	169
<b>2. Participants:</b>						
Active Participants:	231	39	240			
Active Participants with escrow	143	13	156			
Graduates:	38	3	41	158	8	158
Graduates that moved off Housing Subsidy:	15	2	17	112	7	119
Graduate Home owners:	6	1	7	36	4	40
Average time frame to complete contract:				4 yrs	4 yrs	4 yrs
Participants terminated before program completion:	10	0	10	164	6	170
Applicants on Waiting List:	0	0	0			
<b>3. Escrow Accounts:</b>						
HA current escrow in holding for Active Participants:	287,864	28,851	316,745			
Interim escrow withdrawals paid out to Active Participants:	18,452	1,500	19,952	25,622	2,178	28,800
Escrow withdrawals paid to Graduates at contract completion:	136,455	4,940	141,395	498,223	22,947	511,170
Grand Total of generated escrow by Active and Graduated Participants:				802,729	53,985	856,715
Average escrow amount paid to Graduates:				3,235	2,868	3,235
Interim escrow withdrawal by Terminated Participants:				0	0	0
Forfeited escrow by Terminated Participants:	19,431	0	19,431	49,377	4,132	53,509
<b>4. Other:</b>						
A. Has the HA been able to coordinate adequate resources and necessary supportive services for FSS Participants? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>						
If not, what have been the primary resources and/or supportive services that have been unable to be generated within your community?						
B. Based on your experiences in implementation of the FSS Program, what recommendations would improve the effectiveness of the program? We are excited to be getting additional funding for FSS Coordinator positions. We plan to enhance our services and enroll more families.						
C. Please attach any innovative or additional program information that would support the effectiveness of the program.						
**Submit allocation attachment						

## FSS PROGRAM SIZE

(REQUIRED MINIMUM)

Spokane Housing Authority - Spokane, Stevens, and Pend Oreille C

NUMBER OF SECTION 8 FSS SLOTS	DATE OF AWARD LETTER	WAIVER APPROVED (If Yes, Number of Slots and Date of Waiver)	DATE SLOTS MUST BE FILLED	MINIMUM PROGRAM SIZE (Cumulative)
40	1/94		1/96	40
50	3/95		3/97	50
127	12/95	44 - 1/96	12/97	33
4	2/97	4 - Notice PIH 97-45		
18	4/97	18 - ""		
29	7/97	29 - ""		
11	3/97	11 - ""		
15	9/97	15 - ""		
11	9/97	11 - ""		
2/98, Notice PIH 97-45 states that the minimum FSS obligation cannot be reduced below the number of families currently enrolled:				218
100	12/98	45 - 4/99	12/2000	55
(Mainstream)			Total:	273
<u>110</u> have graduated from FSS since CHRA, 10/21/98. Required number of slots are:				<u>163</u>
NUMBER OF PUBLIC HSG FSS SLOTS	DATE OF AWARD LETTER	WAIVER APPROVED (If Yes, Number of Slots and Date of Waiver)	DATE SLOTS MUST BE FILLED	MINIMUM PROGRAM SIZE (Cumulative)
12	4/94		4/96	12
<u>6</u> have graduated from FSS since CHRA, 10/21/98. Required minimum number of slots are				<u>6</u>

## ESS Annual Progress Report

Whitman County

HA: Spokane Housing Authority	Annual Report
Coordinators: Tamara Dawson	Period Ending
Phone: 509-338-4229	9/30/01

	This Report Period			Cumulative		
	SC 3	PH	Total	SC 3	PH	Total
<b>1. FSS program Size:</b>						
Minimum FSS program size based on units received:				25		25
<b>2. Participants:</b>						
Active Participants:	85		85			
Active Participants with escrow:	32		32			
Graduates:	8		8	32		32
Graduates that moved off Housing Subsidy:	6		6	28		28
Graduate Home owners:	2		2	8		8
Average time frame to complete contract:				3 yrs.		3 yrs.
Participants terminated before program completion:	14		14	38		38
Applicants on Waiting List:	0		0			
<b>3. Escrow Accounts:</b>						
HA current escrow in holding for Active Participants:	67,074		67,074			
Interim escrow withdrawals paid out to Active Participants:	0		0	0		0
Escrow withdrawals paid to Graduates at contract completion:	47,791		47,791	98,160		98,160
Grand Total of generated escrow by Active and Graduated Participants:				165,234		165,234
Average escrow amount paid to Graduates:				3,068		3,068
Interim escrow withdrawal by Terminated Participants:				0		0
Forfeited escrow by Terminated Participants:				30,951		30,951
<b>4. Other:</b>						
A. Has the HA been able to coordinate adequate resources and necessary supportive services for FSS Participants? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>						
If not, what have been the primary resources and/or supportive services that have been unable to be generated within your community?						
B. Based on your experiences in implementation of the FSS Program, what recommendations would improve the effectiveness of the program?						
C. Please attach any innovative or additional program information that would support the effectiveness of the program.						

(Submit all above attachments)

## FSS PROGRAM SIZE

(REQUIRED MINIMUM)

Spokane Housing Authority - Whitman County

NUMBER OF SECTION 8 FSS SLOTS	DATE OF AWARD LETTER	WAIVER APPROVED (If Yes, Number of Slots and Date of Waiver)	DATE SLOTS MUST BE FILLED	MINIMUM PROGRAM SIZE (Cumulative)
25	11/92		11/94	25
12	1/94		1/96	12
76	10/96	76 - Notice P/H	97-45	
11	6/97	11 - " " " "		
2/98, FSS minimum obligation cannot be reduced below the number of families currently enrolled in the FSS program:				
				38
11	12/99		12/2000	11
(Mainstream)				
			Total:	49
<u>24</u> have graduated from FSS since passage of GWRA; Minimum number of required slots:				<u>25</u>
NUMBER OF PUBLIC HSG FSS SLOTS	DATE OF AWARD LETTER	WAIVER APPROVED (If Yes, Number of Slots and Date of Waiver)	DATE SLOTS MUST BE FILLED	MINIMUM PROGRAM SIZE (Cumulative)

## ATTACHMENTJ

**Spokane Housing Authority  
Welfare to Work Strategic Plan  
January 1, 2002 – December 31, 2002**

Goals & Actions	Key dates	Lead	Strategy and Success Measures
<b>Leasing</b>			
<b>#1 Maintain 100 percent utilization rate</b> <ul style="list-style-type: none"> <li>• Issue 25 vouchers each month</li> <li>• Lease-up 12 vouchers each month</li> <li>• Review monthly utilization and lease-up rate.</li> </ul>	Each and every month	Occupancy supervisors	Strategy: SHA is already nearly 100 percent leased. We will call up 50 families monthly from the WtW waiting list to ensure continued 100 percent lease-up. Measurement: We will use MTCS to measure utilization; issuance rate will be reported through monthly reports.
<b>#2 Increase landlord participation in Section 8</b> <ul style="list-style-type: none"> <li>• Update rent reasonableness</li> <li>• Maintain payment standard of 110 percent of FMR</li> <li>• Sponsor landlord briefings and develop landlord handbooks</li> </ul>	Every 3 mo. Ongoing  Begin 8/02	Occupancy managers and supervisors	Strategy: Continue rent reasonableness studies every 3 months. Secure a landlord handbook model from the Atlanta HA and modify for SHA landlords. Measurement: Measure whether actions are taken by the deadline. Measure whether any new owners join the program.
<b>Participant Success</b>			
<b>#3 Ensure continued and enhanced services to WtW participants</b> <ul style="list-style-type: none"> <li>• Meet with partners 3 times annually to confirm the services that they can offer.</li> <li>• Contact governor's office and state legislators to tell them that current support services are still needed.</li> <li>• Send monthly self-sufficiency newsletter to all WtW participants.</li> <li>• Enroll 200 additional WtW families in the FSS program.</li> </ul>	Feb., May and Sept., 2002. By Feb., 2002.  By 3/2002  By 12/2002	Resident Initiatives Manager. SHA staff and program participants. FSS staff   FSS staff	Strategy: Ask each partner to confirm the services that they offer. Contact legislators by telephone or mail to continue/enhance support services for families of low income. Measurement: Measure contacts with partners and contacts with governor and legislators. Measure number of WtW participants enrolled in the FSS program by 12/2002.

<b>Goals &amp; Actions</b>	<b>Key dates</b>	<b>Lead</b>	<b>Strategy and Success Measures</b>
<b>Partnership/Administrative</b>			
<b>#4 Reinvigorate the WtW Partnership.</b> <ul style="list-style-type: none"> <li>Develop a new approach to meetings</li> </ul>	February, May, September	Resident Initiatives Manager, FSS staff	Strategy: Brainstorm on diversifying the agenda of the tri-yearly meetings. Measurement: Measure increase in attendance at the tri-yearly meetings.
<b>#5 Improve internal agency coordination re: WtW</b> <ul style="list-style-type: none"> <li>Schedule quarterly staff training on the WtW program</li> </ul>	February, May, August, November	Resident Initiatives Manager	Strategy: Staff must be thoroughly knowledgeable of the WtW program requirements. Measurement: WtW files will contain documentation that WtW participants have completed all program requirements.

## Attachment K – Voluntary Conversion

Monday, November 06, 2000

Development has been asked to examine the issues surrounding the "Voluntary" conversion/disposal of four existing Public Housing stock. Three different approaches were utilized in this examination.

1. HUD analysis: a HUD requirement under proposed rule published 7-23-99.
2. Macro analysis: a snapshot showing current and projected income.
3. Standard method analysis: a project examination utilizing market methods.

### HUD ANALYSIS

This analysis is to determine the most cost effective means of providing housing (Public Housing vis-a-vis Section 8 Voucher). The results are attached on four sheets, but can be summarized as follows:

The cost of maintaining the units as Public Housing is constant @ \$708.87/unit/month.

The cost of maintaining the units as "Sticky Vouchered" with the highest cost (i.e. full FMR and admin fee) is \$647.63/unit/month. The savings is \$61.25/unit/month for an annual total savings of \$91,875 to HUD.

The cost of maintaining the units as "Sticky Vouchered" with the lowest cost (i.e. FMR adjusted for utilities allowance and reduced admin fee) is \$578.15/unit/month. The savings is \$130.72/unit/month for an annual total savings of \$196,080 to HUD.



## **HUD ANALYSIS ASSUMPTIONS**

- a. Construction/modernization costs based upon current level of funding of \$221,765.00
- b. Demolition costs == 0
- c. Because modernization was deemed to be an "on-going" process rather than a one-time event and the costs computed to be equal to twenty (20) years worth of current modernization funds.
- d. TDC is the average based upon the published HUD table equal to \$148,292
- e. Per Unit Operations costs based upon current level of funding (I.e. rents and subsidy) of \$441,240.
- f. Section 8 Voucher admin fees were examined at two levels (i.e. \$40.05 to \$17.00 to reflect lower reimbursement level for SHA owner properties)
- g. Section 8 FMR's were examined at two levels (i.e. at full amount and to reflect site specific utility allowances)
- h. The HUD "Market Analysis" requires that SHA obtain appraisals. The cost estimate for all units is \$27,550.00.

### **"MACRO" ANALYSIS ASSUMPTIONS;**

This is a comparison of the total current level of funding for Public Housing; rents, subsidy and Capital funds; and projected income.

- a. Projected income is based upon FMR's and/or Rent reasonable rent depending upon situation and which is the lower figure.
- b. Total Income includes Admin fees earned by SHA for the Section 8 vouchers., either at the full rate for non-owned properties (pre-conversion) or the reduced rate for SHA owned properties (post conversion).  
Assumes that these vouchers would be moved from market unit to SHA owned units resulting in income loss in admin fees earned.
- c. Projected income assumes a 10% vacancy factor
- d. Rents for Projected are adjusted for utility allowances.

### **TOTAL CURRENT SHA INCOME**

Public Housing Rental income and subsidy payment	\$441,240.00
Public Housing Capital funding	<u>\$ 221,765.00</u>
Public Housing subtotal	<b><u>\$663,005.00</u></b>
Current Admin income from 125 Section 8 vouchers	
@ \$40.05/unit/month for non-SHA owned units	<u>\$ 60,075.00</u>
Total	<b><u>\$723,080.00</u></b>

### **TOTAL PROJECTED SHA INCOME**

Rental Income Scattered Sites	\$529,124.00
(Note: rents at FMR after comparison with rent reasonable)	
A Rental Income Parsons Apartments	<u>\$218,521.00</u>
(Note: rents at rent reasonable after comparison with FMR)	
Subtotal rental income all converted units	<u>\$ 747,645.00</u>
Income from 125 Section 8 vouchers	
@ \$17.00/unit/month for SHA owned units	<u>\$ 25,500.00</u>
Total	\$773,145.00

Analysis projects that there should be a net positive income to SHA of an additional \$50,065.00 based upon the projected income.

An additional \$82,035.00 could also be earned by the SHA if the vacancy factor was reduced to 0%.

## **PROJECT EXAMINATION PER STANDARD METHODS:**

This analysis was examined with the scattered-sites and Parsons as separate entities. A copy of the standard Proforma and rent income sheets is attached for each entity. The results on each sheet can be summarized as follows:

### **For Scattered-sites:**

If rents are held at the FMR post conversion, there is no increase in the amount of rent paid by the current tenants (i.e. 30% of income) on a voucher compared to what they pay for rent as a Public Housing unit.

The project cash flow goes to a negative number in year 27. Project cash flow is calculated after expenses and reserves for operations are subtracted from the NOI.

At year 27, \$60,000 will have been placed in reserves for operations, \$2,250,000 placed in reserves for replacements and \$2,013,854 in project cash flow funded.

### **For the Parsons:**

Project cash flow is calculated after expenses and reserves for operations are subtracted from the NOI.

Project cash flow goes negative in year 17. (based on Rent Reasonable rents)

At year 17 \$60,000 will have been placed in reserves for operations, \$637,500 placed in reserves for replacements and \$214,350 in project cash flow funded.

If Fair Market Rents are utilized for the analysis then the project cash flow does not go negative until year 23.

It may be assumed that the current lower Rent Reasonable Rents will increase to approach or exceed the Fair Market Rents in the near future because of the events occurring within the geographical area of the Parsons. If the rents reach the projected FMR level at any time prior to year 17, then the project cash flow does not go negative until year 23.

**STANDARD METHOD ASSUMPTIONS**

- a. Project incomes do not include income to SHA from the administrative fees earned by SHA for the 125 Section 8 vouchers.
- b. The costs of performing Section 8 HQS inspections for the SHA owned units is included in the expenses numbers. This is calculated at \$30.00 per inspection and includes one annual inspection per unit and re-inspection of 10% of the units per month.
- c. Rental income for the Parsons is based upon the lower rent reasonable rents published on 09/00 rather than the Fair Market Rents. The differential for one (1) bedroom unit is \$20.00/unit/month and for two (2) bedroom units \$21.00/unit/month. Rents were reduced by specific utility allowances.
- d. Rental income for the scattered sites compared the FMR to rent reasonable levels and it was found that the FMR was exceeded by the Rent reasonable level. Rents were adjusted downward for utility Allowances
- e. All rental incomes included a reduction based upon a 10% vacancy.
- f. Property management fees were estimated at 7% and include the accounting functions necessary for property management, pro-rata shares of Property Manager and Asset Managers salaries, and other central office costs including maintenance of site based waiting lists.
- g. Other expense numbers utilized were based upon actual figures from accounting.
- h. Replacement/Capital Reserves were increased by \$50.00 per unit per year every five years for the scattered-sites only
- i. Replacement/Capital Reserves were set at \$750.00 per unit for the Parsons and \$1,000 per unit for the scattered-sites and are treated as "Expenses".
- j. Rents were increased at a rate of 1.75% per year and expenses were increased 3% per year.
- k. An additional \$2,500 per project is included for audit costs under the line item for "legal & accounting"

- l. CostsofSection8voucheradministrationarebornebySHAfrom adminfeesnotincludedinincome.
- m. Analysisofconversionwillincludeutilizationoftheappraisals obtainedfortheHUDanalysis.Thatcostisestimatedat\$27,550.00
- n. Scattered-siteanalysisshouldkeepinmindtheeventualutilizationof unitsinahome-ownershipprogramand/orsale.Revenuefromsuch saleisnotreflectedinanalysis
- o. ItisassumedthattheParsonsexpenseincluderentforatwobedroom unitanda\$400/monthstipendforaresidentmanager.
- p. StaffingforParsonsalsoincludesone(1)fulltimemaintenanceperson
- q. Staffingforthescatteredsitesisthree(3)fulltimemaintenance personsincludingonelaborerforpaintingandyardcare.
- r. Operatingreserveswereincludedat\$10,000peryearforsixyearsand thenreducedtozero.Alevelof\$60,000forthisaccountwouldbe maintainedandreductionsreplacementfundedinthefuturefrom ProjectcashFlow.
- s. Scattered-siteexpensesincludeanadditional\$500perunitsfor landscapingcostsascontractservices.
- t. NoPILOTpaymentsareincluded.
- u. TheimpactofatrashcompactionssystemfortheParsonsApartments isnotcalculated.ThiswasfundedunderthecurrentyearsCapital Fund.

## **RECOMMENDATIONS:**

This analysis indicates that it is financially feasible to convert the current Public Housing stock to "FMR" based units especially the scattered-site units.

The scattered-site units present a very healthy Proforma that will allow for their conversion and utilization in a future "Homeownership" program.

If the Parsons Apartments continue to serve elderly and disabled tenants, and a social services program is deemed essential, funds for that program with a time worker will have to be found outside of the income of the apartments themselves.

Other sources of subsidy for Parsons Apartments operations have not been identified and will have to be developed. Conversion of Commercial spaces (i.e. COPS SHOP) or increased rental incomes were not examined in depth.

Without sources of income to provide social programs for elderly and disabled tenants, the possible conversion of the Parsons Apartments to serve persons at or below 30% of AMI without other restrictions might be considered.

## AttachmentLSpokaneHousingAuthorityPrograms

PROGRAM NAME	DESCRIPTION	INCOME CRITERIA	SERVICE AREA	FUNDING SOURCE	TOTAL ANNUAL FUNDING (APPROX)	UNIQUE ELGIBILITY REQUIREMENTS	NUMBER OF UNITS (EST.)
SECTION 8	TENANT BASED PRIVATE MARKET RENTAL ASSISTANCE	75% BELOW 30%; ALL BELOW 80%	4 COUNTIES: SPOKANE, PEND ORIELLE, WHITMAN, STEVENS	HUD => SHA	\$11,416,317		3138
SECTION 8-MAINSTREAM FOR DISABILITIES	TENANT BASED PRIVATE MARKET RENTAL ASSISTANCE	75% BELOW 30%; ALL BELOW 80%	SPOKANE AND WHITMAN COUNTIES	HUD => SHA	\$789,000	DISABLED HEAD OF HOUSEHOLD OR SPOUSE UNDER THE SOCIAL SECURITY ACT	170
SECTION 8-WELFARE-TO-WORK	TENANT BASED PRIVATE MARKET RENTAL ASSISTANCE	75% BELOW 30%; ALL BELOW 80%	4 COUNTIES: SPOKANE, PEND ORIELLE, WHITMAN, STEVENS	HUD => SHA	\$3,251,000	TANF RECIPIENT CURRENTLY OR WITHIN THE LAST 2 YEARS OR CURRENT TANF RECIPIENT AND WORKING; PARTICIPATION IN INDIVIDUAL RESPONSIBILITY PLAN	700
SECTION 8-FAMILY UNIFICATION	TENANT BASED PRIVATE MARKET RENTAL ASSISTANCE	75% BELOW 30%; ALL BELOW 80%	4 COUNTIES: SPOKANE, PEND ORIELLE, WHITMAN, STEVENS	HUD => SHA	\$464,000	REQUIRES DSHS REFERRAL OF CHILDREN MUST BE SEPARATED FROM PARENTS OR AT RISK OF SEPARATION	100
SECTION 8 --SRO MOD REHAB	PROJECT-BASED RENTAL ASSISTANCE	ALL BELOW 80%	CITY OF SPOKANE	HUD => SHA	\$429,795	MUST BE A SINGLE ADULT AND HOMELESS	124
PUBLIC HOUSING	PROJECT-BASED AND SCATTERED SITE RENTAL ASSISTANCE	40% BELOW 30%; ALL BELOW 80%	SPOKANE COUNTY	HUD => SHA	\$975,752	ELIGIBILITY FOR THE PARSONS BUILDING: MUST BE OVER 55 OR DISABLED	125
HOME	TENANT BASED PRIVATE MARKET RENTAL ASSISTANCE	50% OR BELOW	SPOKANE CITY LIMITS & PEND ORIELLE	HUD => CTED & CITY OF SPOKANE => SHA	\$650,000	2 YEAR ASSISTANCE MAXIMUM ; HOUSING MUST BE WITHIN CITY LIMITS	146
HOPWA/CTED	TENANT BASED PRIVATE MARKET RENTAL ASSISTANCE	80% OR BELOW	12 COUNTIES: ASOTIN, FERRY. ADAMS, SPOKANE, WHITMAN, STEVENS, GARFIELD, OKANOGAN, LINCOLN, COLUMBIA, WALLA WALLA, PEND OREILLE	HUD => CTED => SHA	\$126,600	MUST BE DIAGNOSED WITH HIV OR AIDS	15
HOPWA/REACH	TENANT BASED PRIVATE MARKET RENTAL ASSISTANCE	50% OR BELOW	7 COUNTIES: SPOKANE, ADAMS, WHITMAN, LINCOLN, FERRY, STEVENS, PEND OREILLE	HUD => SPOKANE COUNTY => SHA	\$114,000	MUST BE DIAGNOSED WITH HIV OR AIDS	33
WOODHAVEN	SHA-OWNED PROPERTY	50% BELOW 80%	SPOKANE COUNTY	BOND FINANCING +> SHA	\$265,848		72
COURTVIEW	SHA-OWNED PROPERTY	4 UNITS @ 30% OR BELOW; 6 UNITS @30%-50% BELOW;	CITY OF SPOKANE	BOND FINANCING; ANDTRUST FUND => SHA	\$ 46,480		14
VALLEY 206	SHA-OWNED PROPERTY	50% BELOW 80%;	LOCATED IN THE SPOKANE VALLEY	BOND FINANCING => SHA	\$ 1,152,177		207
HERITAGE HEIGHTS	SHA-OWNED PROPERTY	3% BELOW 30%, 73% BELOW 40%, 24% BELOW 60%	LOCATED IN NORTHEAST SPOKANE	TAX CREDIT;HOME, CDBG AND WCRA => SHA	\$ 266,138	MUST BE OVER 55 YEARS OLD	62
WESTFALL VILLAGE	SHA-OWNED PROPERTY	3% BELOW 30%, 73% BELOW 40%, 24% BELOW 60%	LOCATED IN NORTHEAST SPOKANE	TAX CREDIT; HOME; AND WCRA => SHA	\$ 511,346		110
CEDAR WEST	SHA-OWNED PROPERTY	50% BELOW 80%	LOCATED IN NORTHWEST SPOKANE	BOND FINANCING	\$ 399,873		74
THE NEWARK	SHA-OWNED PROPERTY	50% BELOW 80%	CITY OF SPOKANE	WASHINGTON STATE TRUST FUND => SHA	\$12,420		6
INDEPENDENT FAMILY FUTURES \$ ROSS	SUPPORT SERVICES PROGRAM; NO RENTAL ASSISTANCE		4 COUNTIES: SPOKANE, PEND ORIELLE, WHITMAN, STEVENS	HUD=>SHA	\$ 142,000	MUST BE SECTION 8 OR PUBLIC HOUSING PARTICIPANT	500

AttachmentM – **OTHERPUBLICCOMMENT**

Nootherpublic commentreceivedonthe2002AgencyPlan



**RESOLUTION No. 370**

**RESOLUTION TO SUSPEND THE 8-HOUR COMMUNITY SERVICE REQUIREMENT FOR PUBLIC HOUSING RESIDENTS.**

**WHEREAS** Congress, in the current appropriations, has provided the option for housing authorities to not enforce the 8-hour community service requirement for public housing residents.

**WHEREAS** the current Admissions and Continued Occupancy Policy for Public Housing requires 8-hours of community service each month for public housing residents.

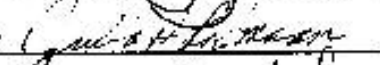
**NOW, THEREFORE BE IT RESOLVED** by the Board of Commissioners, the Spokane Housing Authority is suspending its enforcement of the 8-hour community service requirement 30 days from today's date and will not enforce this provision of our Admissions and Continued Occupancy Policy so long as Congress provides for the option to not enforce it.

**PASSED AND ADOPTED THIS 8<sup>TH</sup> DAY OF JANUARY 2002.**

Chair



Vice Chair



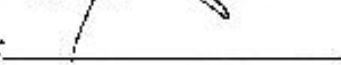
Commissioner



Commissioner

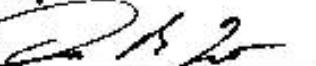


Commissioner



Attested to by:

Secretary



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## ATTACHMENTO

Spokane Housing Authority Resident Advisory Board  
Minutes for August 22, 2001  
Compiled by Secretary Traci Nelson

Meeting was called to order at 2:07 p.m.

Members in attendance were:

Colleen Larson Vice Chair  
Traci Nelson, Secretary  
Rich Graham  
Annette Lavarro  
Rhea Coble  
Lloyd Milan

Quorum was established

Staff Members in attendance were Diane Quast and Joe Cheesman

Joe Cheesman is our new staff liaison. You can reach him at Chester Brown's old number.

Diane said that the Resident Advisory board was established to give feedback on the 5-year plan. The first year this plan was presented it was huge. The last year the plan was smaller. Diane plans for the next plan to be close to last time as they wish to only make a few changes. The housing Authority plans to have the plan completed by January because they intend to develop their budget to support the plan.

The Board for Spokane Housing Authority will make the propositions to the plan. The resident Advisory Board will make their recommendations. The plan will return to the SHA Board for final approval. To facilitate this process Diane wants to secure the beginning of the September and October meeting to receive our input. During the October meeting Joe, or new staff liaison, will present the plan since Diane will be out of town.

In order to communicate with the public about the 5-year plan, SHA will put a legal notice in the newspaper and have several service agencies make announcements. The completed plan will be sent to the County Commissioners Office and to the North West Justice Project.

A motion to accept the proposed course of action was seconded and passed.

The scheduled discussion on term limits was once again tabled due to lack of majority.

Discussion took place about how to get new board members. The possibility of Rich making a notice and a flyer requesting volunteer applications was raised. Suggestion was made that we could talk to people while we are waiting on appointments. Joe Cheesman was asked to look into the possibility of having staff member select 5 clients to mail a prepared flier requesting volunteer applications. Suggestion was made to put a notice in the Community Voice.

Meeting adjourned at 3:00 p.m.

Agenda for next meeting  
Diane Quast will present 5-year plan  
Discussion of Term limits

## ATTACHMENT P

### **STATEMENT OF PROGRESS IN MEETING 5-YEAR PLAN MISSION AND GOALS**

The Spokane Housing Authority has functioned well as a “traditional” housing authority for the past 29 years. The primary housing resource we offer our community is through the Section 8 – Tenant Based Rental Assistance Program. SHA is the largest provider of affordable housing for low-income households in the Inland Northwest. There have been few federal dollars available for the development of additional affordable housing for the past 10 to 15 years. The need for affordable housing has far surpassed the availability of such housing in the Spokane region. Given these realities, SHA has dedicated this past year in shoring-up its foundations in preparation for a new future that will be more entrepreneurial in nature.

Continual evaluation of the structure and functions of individual staff and the organization as a whole are now standard practice. It is one way that we are recognizing the fluctuations and changes of our industry and our need to flex and adapt how we conduct our business to take advantage of these changes.

The Board of Commissioners has initiated new sub-committees to provide additional oversight to the functioning of SHA. A Finance sub-committee is now established to provide on-going review of SHA’s financial practices. Last year’s audit was without any findings and a strong signal that SHA’s financial practices are healthy and consistently applied.

A Development sub-committee was established to define where and how we want to move in growing this organization to better serve the needs of low-income people.

Diversification of SHA’s housing portfolio is a must. Although the Federal Government currently looks upon the Tenant Based Voucher Program with favor, SHA needs to provide a wider variety of housing choices for those we serve. The mission of SHA’s future development will pursue multiple avenues to create affordable housing opportunities throughout the Inland Northwest. SHA will utilize flexible funding sources to expand and diversify its portfolio. Housing developed by SHA will provide families stability, and quality housing that is diversified throughout the community in mixed income environments.

### **ASSETMANAGEMENT**

At the Spokane Housing Authority we continue to fine-tune the balance of the physical, financial and programmatic needs of each facility. We have begun

implementing the principles of asset management consistently to all facilities whether managed in-house or outsourced (contracted out). Goals have been established for outsourced properties and their progress is being monitored. Long-term capital improvement plans for all properties have been established, modeled after the capital replacement plan developed for our public housing. This will fortify the long-term viability of Spokane Housing Authority facilities. In the area of enhanced safety we have initiated annual fire safety events for each multi-family community and trained site managers and the asset manager to be active participants in the Spokane Crime Free Multi-Family Housing Program. One goal is to have all multi-family communities achieve "crime-free" designation by fiscal 2002 year-end. These safety goals will expand the visibility of the Spokane Housing Authority in the greater community. In the area of finance Spokane Housing Authority has introduced supervisors to team budget development creating a foundation for future budgets to also involve input from frontline staff. Team budgeting will strengthen facility operations through synergy.

### **PURSUING AND DEVELOPING NEW PARTNERS**

The Spokane Housing Authority vision and mission for development is quite different today than it was a year ago. Horizons have been broadened and Partnering has become essential in order to affirm SHA's commitment to our communities and residents. A new partnership was formed this year in order to provide very low income shared housing for persons with disabilities. SHA and Transitions, a local non-profit, have joined together to produce two new duplexes on SHA owned land that will house 8 disabled residents in permanent supportive housing. SHA will retain ownership of the land and lease back the improvement to Transitions who will manage the development. "The Elizabeth" is the natural progression of a continuum of care and will provide those that are disabled with a long term safe independent living environment and specialized services. SHA is aggressively seeking these opportunities in order to provide affordable, permanent living environments to all persons of low income in our four county service areas. Partnering with non-profits, local governments and for-profit developers is the challenge of today and the future for SHA.

### **LANDLORD ADVISORY GROUP**

Spokane Housing Authority has started a Landlord Advisory Group in the past year. This group meets approximately every 3 months. This group is similar to the Resident Advisory Board which offers input to SHA staff regarding participant concerns. Landlords who own or manage all types of housing in the Spokane area represent this group. Through this group of landlords, we have discussed and implemented changes to our Section 8 tenant based rental assistance program. The changes were made to provide a faster turn around on new unit

inspections, which saves landlords from longer vacancies. These landlords have brought up concerns such as inconsistencies between Housing Quality Specialists. Spokane Housing Authority has instituted additional training of our HQS staff focused on consistent application of HQS Standards. The Landlord Advisory Group has been very helpful in providing feedback that allows us to continue to improve on our delivery of service, ensuring that SHA maintains high utilization of our rental assistance programs.

In FY 2001 Spokane Housing Authority began electronically depositing Housing Assistance Payments directly to landlord bank accounts through the ACH banking system. Payments are deposited on the day the payments are generated, eliminating sometimes long postal service delays and the chance of theft or loss. This represents one more example of SHA's continuing commitment to improving efficiencies and customer service. Landlord reaction to the new program has been very positive.

#### **SELF-SUFFICIENCY PROGRAM LAY FOUNDATIONS FOR SUCCESSFUL FINANCIAL FUTURES**

Independent Family Futures establishes escrow accounts for families that increase their earned income. When families successfully maintain employment without public aid, they are eligible to collect the escrow. Of the 40 families that have completed the IFF Program this past year, 38% have purchased or are in the process of purchasing homes--the ultimate measure of self-sufficiency! Nine are investing their funds in more reliable transportation (so they can get to work to keep their jobs), eight are paying debt, including medical debt, three are banking their funds in savings accounts and two are using the money to relocate for new/better jobs. Graduates are also using escrow for education, retirement, and renting better places to live. This year's IFF graduates are employed as cabinet makers, case managers, hairstylists, nail technicians, caricature artists, administrative assistants, electricians, office assistants, manufacturers, plumbers, nursing home administrators, teachers, accountants, retail clerks, store managers, welders, supervisors, janitors and bartenders. The IFF Program has served over 600 families during its six-year existence; 340 currently participate and 185 have escrow accounts. A total of 183 have "graduated" from the program.

#### **ROSS PROGRAM**

"Resident Opportunities and Self-Sufficiency" (ROSS), is targeted to our 75 scattered-site public housing families. The 54 families that participate in ROSS have access to intense case management and referral to a broad range of community resources. Since the beginning of the program last October, 9 families have increased their earned income. Twenty-four ROSS participants are

also enrolled in the IFF Program. One just completed IFF and is purchasing her own home. For the fifth consecutive summer, SHA is offering a youth employment program, "Rent-A-Kid". SHA youth, 13-17 years of age earn money to support themselves and their families. Since 1997, over \$5,000 has been earned by program participants.

### **HIGH UTILIZATION IN ALL TBRA PROGRAMS & IMPROVED CUSTOMER SERVICE**

SHA Staff successfully met the challenge of leasing up 700 new Welfare to Work Vouchers, one of the first Housing Authorities to do so in the nation. By the end of FY2001, SHA achieved an overall lease-up of 102% for its Section 8 programs in all counties. This is the result of teamwork between the accounting and occupancy staffs sharing information and forecasting how many more families can be assisted with the dollars that are available. Better utilization of our programs translates into a better service that SHA provides to its communities in all four counties.

SHA Staff strives toward better customer service. Streamlining and paper reduction was the goal. We changed our Annual Recertification process from in-office interviews, to mail-in. Clients no longer come to our office for their Annual Recertification interview. Instead Clients are notified of the verifications needed for annual income and family status and the date in which they need to mail it to our office. This process accommodates clients who are employed. SHA has also upgraded its web site, giving our clients easy access to newsletters, job announcements and other information about the SHA.